

Chapter 8

Job Cards

Create a New Job Card

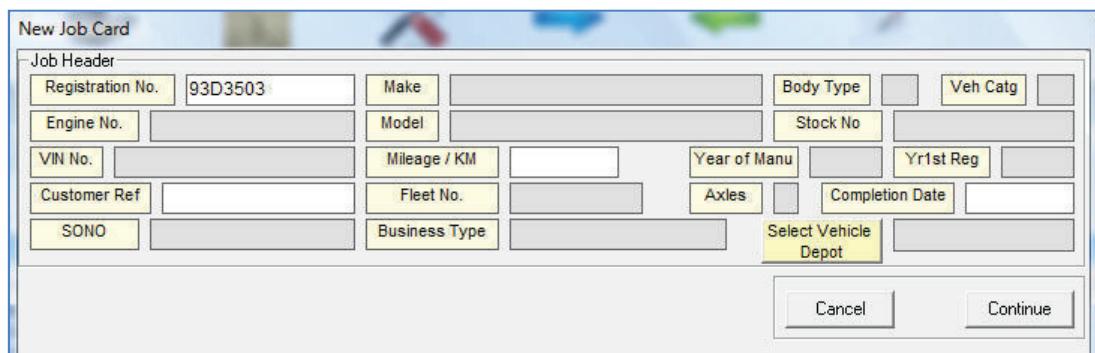
Click **Job Cards** at top bar of buttons on main screen.



To enter a new Job Card on the system, click **New** from the Job Card section.



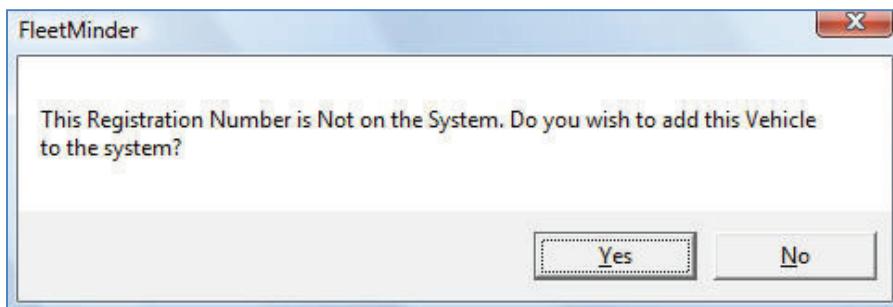
This will bring you to the Job Card setup screen.



New Job Card

Type in the *Registration No.* of the vehicle and press **Enter**.

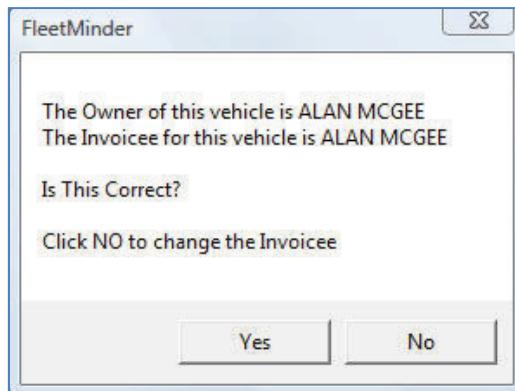
If the vehicle is not known to FleetMinder then you will be prompted to add the vehicle using the *Vehicle Wizard*.



Registration not on FleetMinder

If the vehicle is known to FleetMinder then its details will automatically be taken from the database.

You will be prompted to check whether the *Owner* and *Invoicee* details are correct before starting.

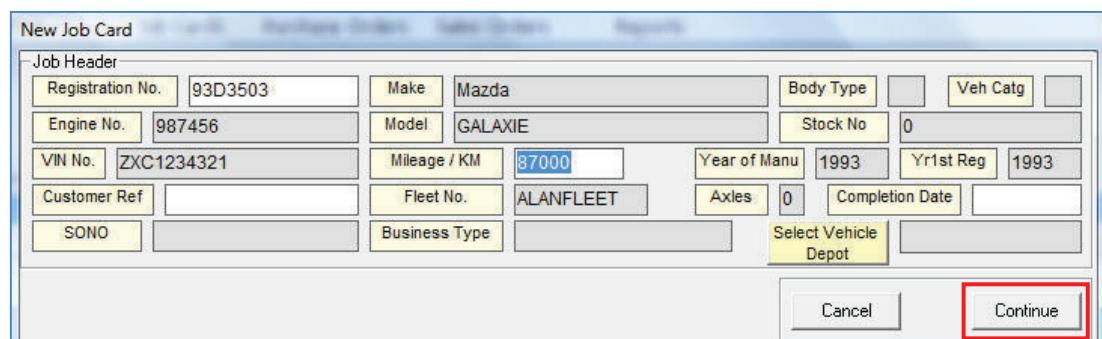


Check Owner and Invoicee

If you are happy with the invoicee details, click **Yes** to confirm it is correct.

If you are not happy with the invoicee details, click **No** and you will be brought to the section where you can alter the invoicee for the job card for this vehicle.

The system will fill in as much of the details at the top of the form as it knows regarding the vehicle.



Known Vehicle

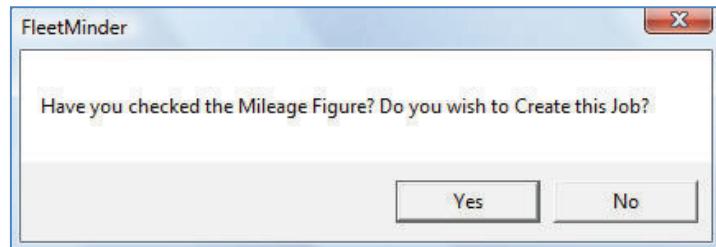
Click **Continue**.

Ensure that the mileage/km is correct as this is relevant for the updating of the Service/ Calibration area which is triggered by distance travelled as well as amount of time that is passed.

This is why the system queries as to whether you have checked the *Mileage Figure* and also whether you actually want to create the job.

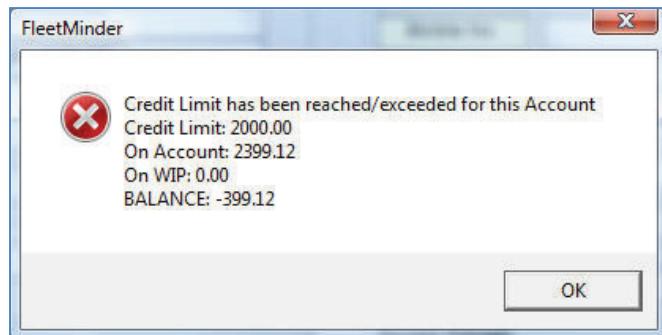
If you want to continue, click **Yes**.

If you want to abandon this job card, then click **No**.



Odometer Confirmation

At this stage you may see a warning if the customer has gone over their credit limit in Sage.



Credit Limit Warning

The Credit Limit warning will not prevent you from continuing with the Job Card, it is only present as a warning. Contact your Accounts department to resolve any issues.

You will then be brought to a reduced version of the job card where you can enter the basic information necessary to start the job card.

A screenshot of the 'New Job Card' window. The top section is a 'Job Header' form with fields for Registration No. (93D3503), Make (Mazda), Model (GALAXIE), Body Type, Stock No (0), Engine No. (987456), VIN No. (ZXC1234321), Mileage / KM (87000), Year of Manu (1993), Yr1st Reg (1993), Customer Ref, Fleet No. (ALANFLEET), Axles (0), Completion Date, SONO, Business Type, and a 'Select Vehicle Depot' dropdown. Below the header is a note: 'Details for Job Number: 001373374' and buttons for 'Instructions', 'Vehicle Details', 'Customer', and 'Job Types'. A large empty text area is provided for instructions. At the bottom are 'Save' and 'Close' buttons.

Basic Job Card

There are 4 tabs available:

- *Instructions* – see the next section for details
- *Vehicle Details* – a read-only summary of the vehicle details
- *Customer* – details of the customer and invoicee
- *Job Types* – details on the type of work to be carried out.

Details for Job Number : 001373374

Instructions | Vehicle Details | Customer | Job Types |

Tabs

Vehicles Details and *Customer* are read-only so they can only be viewed. Instructions are dealt with in the next section.

The *Job Types* tab contains checkboxes that can be used to bring certain types of job to the attention of the mechanics.

Details for Job Number : 001373374

Instructions | Vehicle Details | Customer | Job Types |

Pending
 In Process
 Claim Made
 Off Site
 Awaiting Order Number

Job Types Tab

Clicking on a checkbox will automatically add an instruction to the Job Card.

At this stage you can click **Save** to save the Job Card, or click **Close** to close the Job Card.

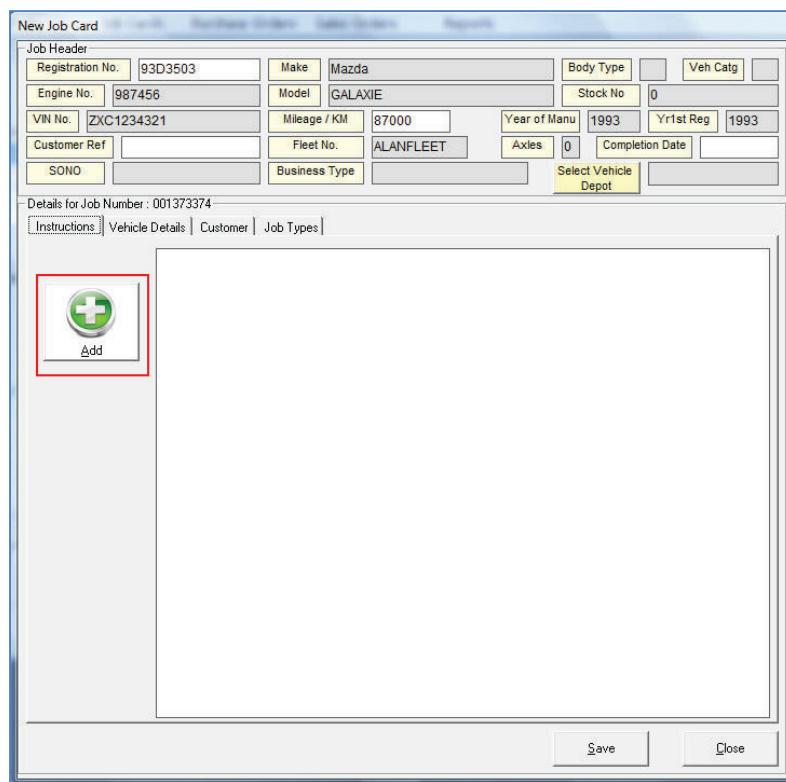
Or, to add instructions to the Job Card, read the next section.

Job Card Instructions

Add an Instruction to a Job Card

Click on the **Instructions** tab.

Click on the **Add** button.

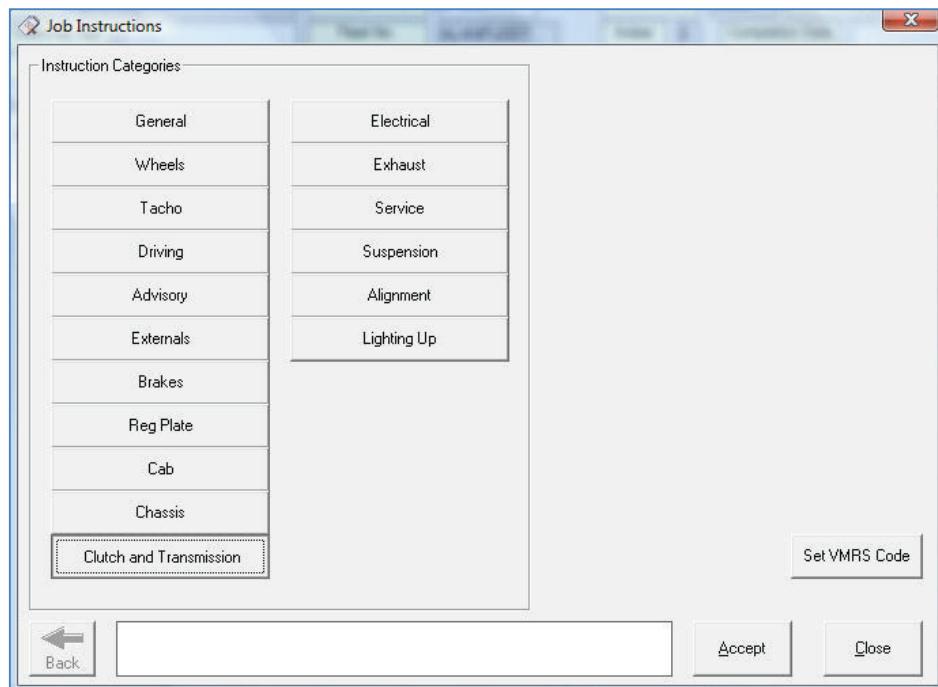


The screenshot shows the 'New Job Card' application window. At the top, there are tabs for 'Job Header', 'Vehicle Details', 'Customer', and 'Job Types'. The 'Job Header' tab is active, displaying vehicle details like Registration No. 93D3503, Make Mazda, Model GALAXIE, and various other fields. Below the tabs, a message says 'Details for Job Number : 001373374'. The 'Instructions' tab is selected, showing a large empty panel with a red box highlighting the 'Add' button, which has a green plus sign icon. At the bottom of the window are 'Save' and 'Close' buttons.

Add an Instruction

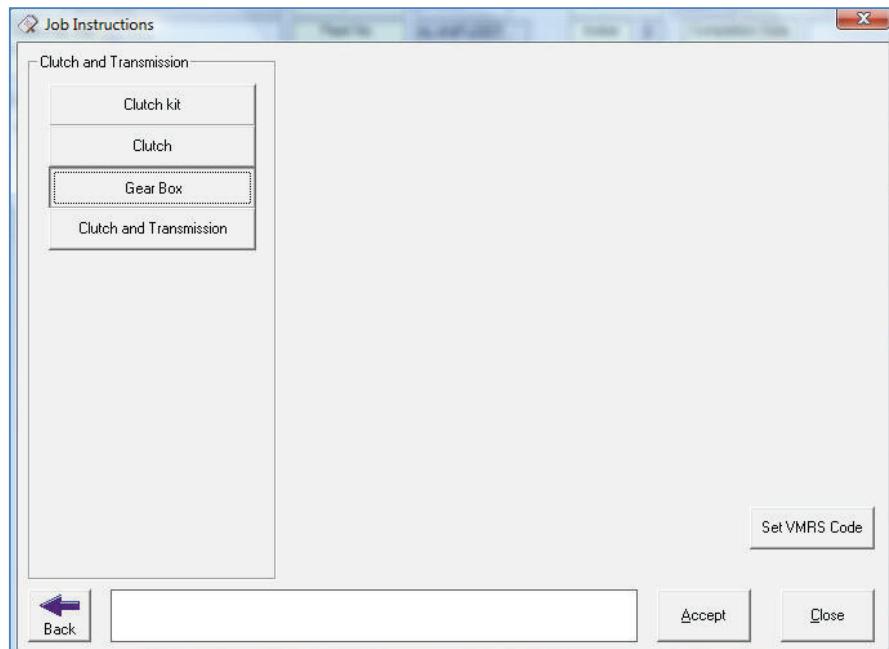
During setup of the system, your administration will have generated a list of instruction categories and sub-details. In the example here, we have used a frequent occurring item, but it may not be in the same location and you must familiarise yourself with your companies selected Instruction Categories and Sub-Details.

Click on the *Instruction Category* that you wish to use. Our example has selected ***Clutch and Transmission*** button.



Instruction Category

Next, click on the *Sub-Detail*.
In our example, we have selected **Gear Box**.



Sub-detail in the Job Instruction

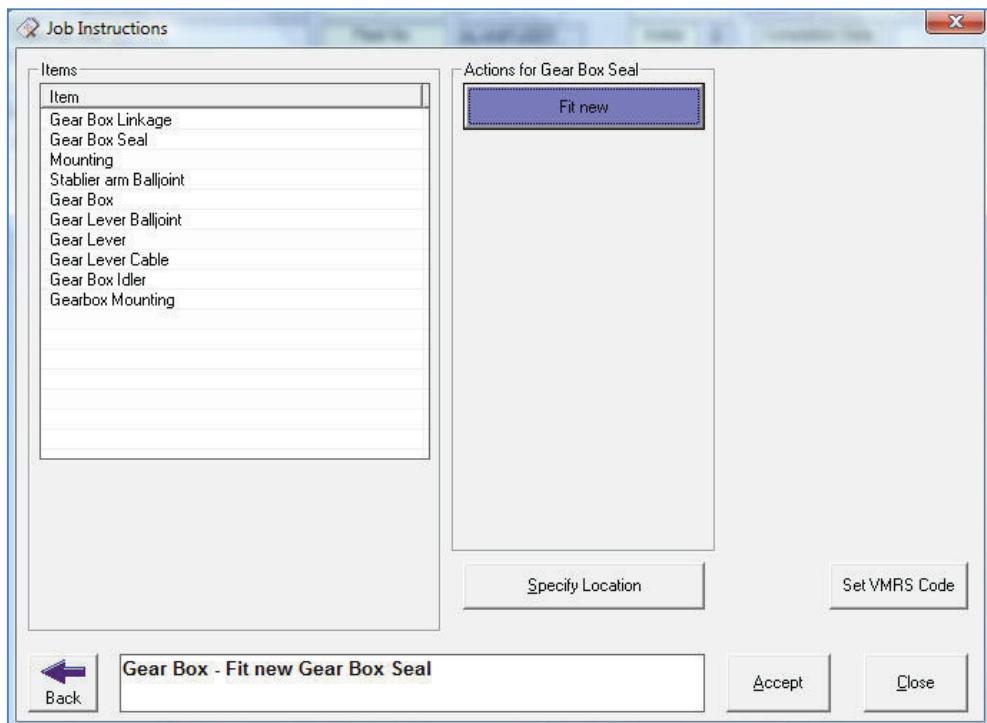
The next screen prompts us to select an *Item*, in our example, we select **Gear Box Seal**.

When we click on the item we want to select, a list of *Actions* appears to the right.

Click on the *Action* you wish to instruct to carry out on the Item.

In our example, we have one action button, **Fit new** and so we click it.

At the bottom the constructed sentence appears:
“Gear Box – Fit new Gear Box Seal.”

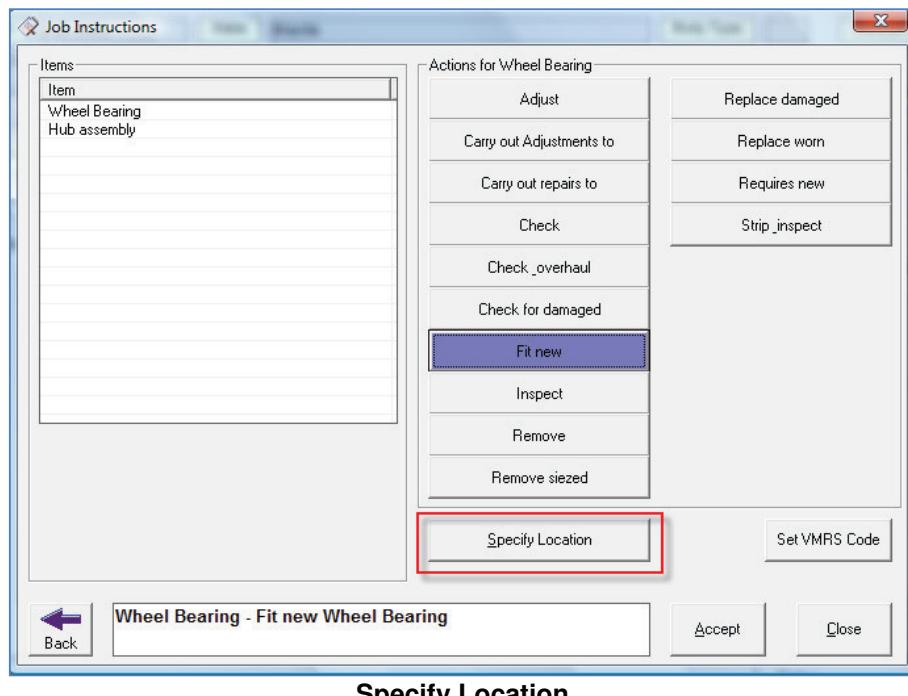


Select the Item and Action

Click **Accept** to complete the instruction generation process.

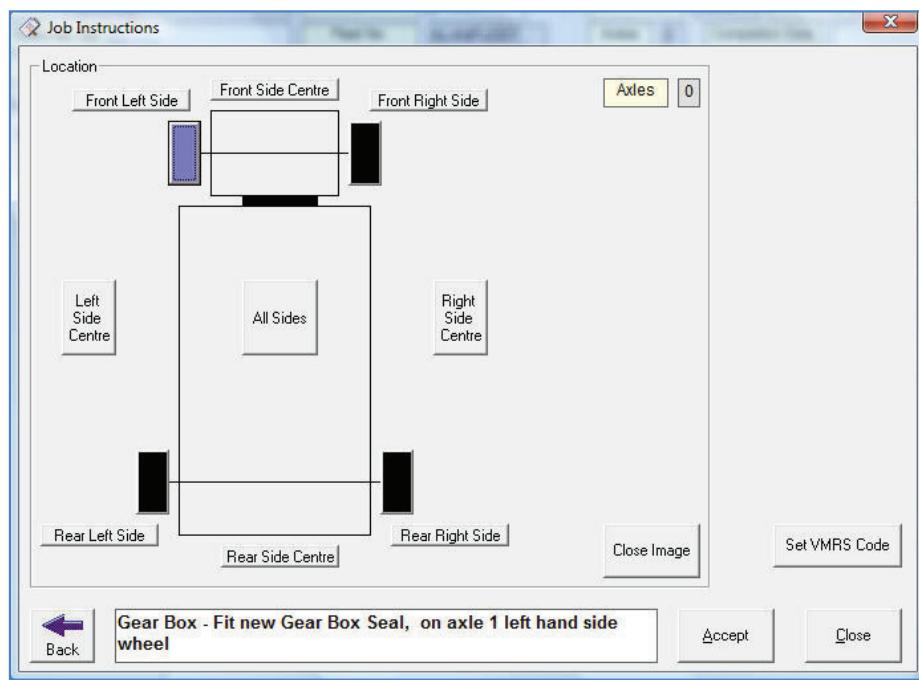
Specify a Location in a Job Instruction

Before you click on **Accept** to save the instruction and close that section, click on the **Specify Location** button.



Specify Location

This will display a basic aerial image of the vehicle.



Location for the Instruction

You can then specify which location the instruction is to be carried out on. In this example it is to replace the damaged tyre on the left at the front (axle 1) of the vehicle.

The locations that are available are:

- *Front Left Side*
- *Front Side Centre*
- *Front Right Side*
- *Right Side Centre*
- *Rear Right Side*
- *Rear Side Centre*
- *Rear Left Side*
- *Left Side Centre*
- *All Sides.*

The button will turn from grey colour to a blue colour to show it is logged. It will also appear in the written instruction in the text box at the bottom of the screen.

You can select more than one location by simply clicking on the required locations.

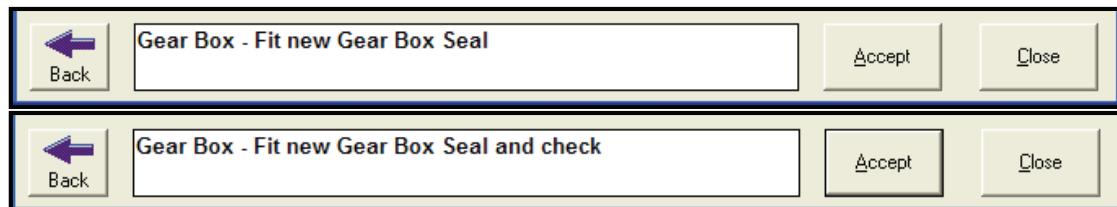
If the vehicle image hasn't enough axles, alter the value in the axle's box in the top right corner.

Click on the tyre image to indicate which tyre needs attention. The image of the tyre will change colour when it is clicked, going from black colour to a blue colour to show it is logged.

Click **Accept** to store the instruction created or click on **Close Image** to exit without saving.

Add Your Own Details to the Job Instruction

After you have generated the full instruction, including specifying any location, but before you click **Accept**, click on the white text box where the instruction has been generated and type in any extra text you wish.



Add Your Own Details Instruction

In our example: **Gear Box – Fit new Gear Box Seal** was generated by the system but then our user clicked the text box, just after the word **Seal** and typed in their own extra detail: **and check**.

Once you are happy with the alteration and wish to save it, click on **Accept**.

NOTE: If you alter the *location* notes or any of the *sub-details*, it will reset the text box with the original system-generated text and your added text will be deleted so ensure that any additional notes are added AFTER the generated text has been created.

NOTE: The maximum amount of text that can be entered is 1000 characters.

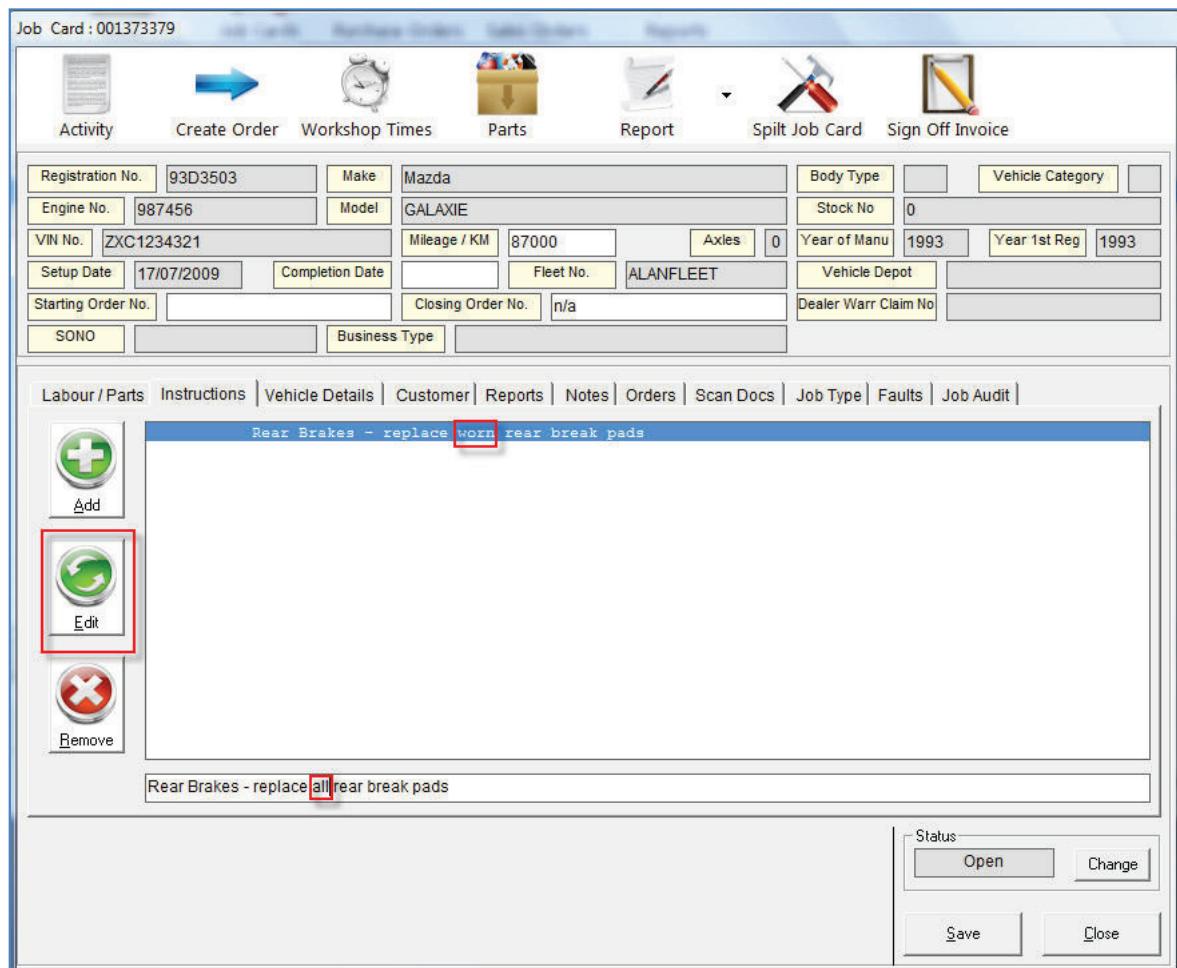
Edit an Instruction on a Job Card

Open the relevant job card from the list.

Click *Instructions* tab.

Highlight the instruction that you wish to alter by clicking on it once.

Click **Edit**.



Edit an Instruction

This will bring up a text box, with the instruction filled in it.

Edit the text as appropriate – in our example, ‘Replace **worn** rear brake...’ is replaced with ‘Replace **ALL** rear brake...’

Once you are happy with the alteration, press **Enter**.

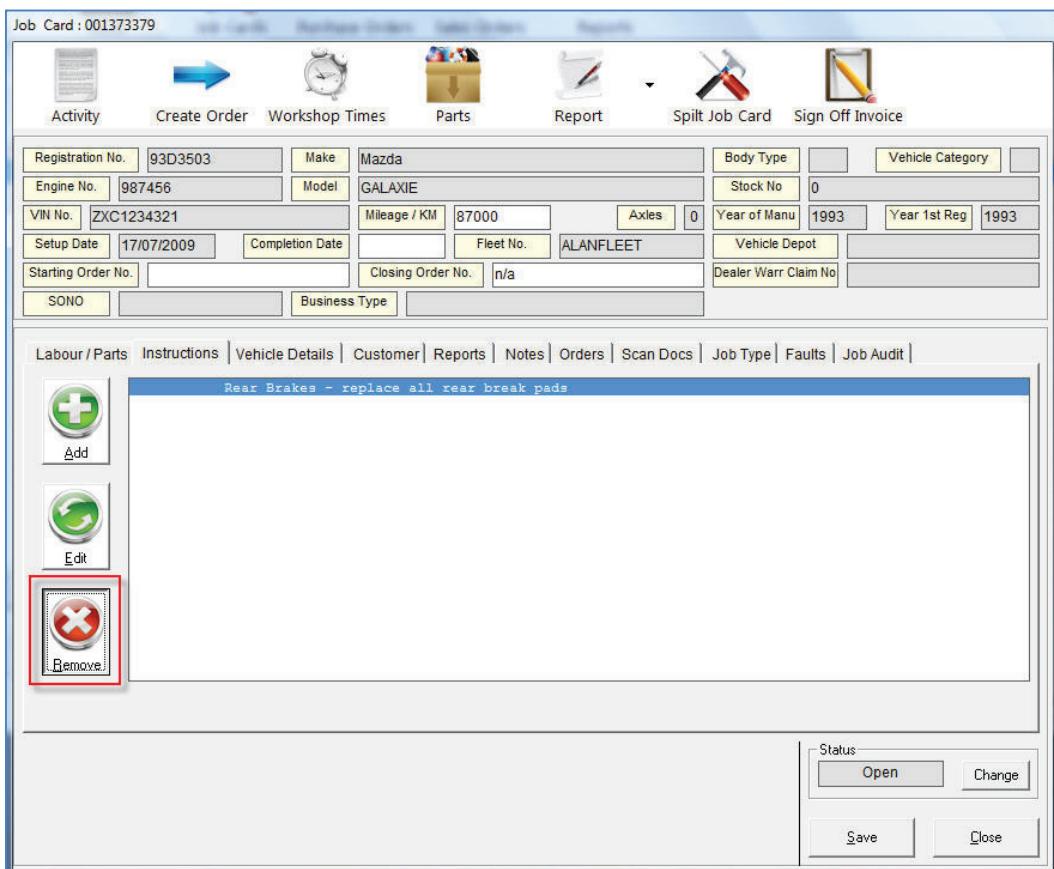
This will change the instruction that is displayed.

Delete an Instruction from a Job Card

After opening the job card you wish to edit from the **Job Cards** section, click on the *Instructions* tab.

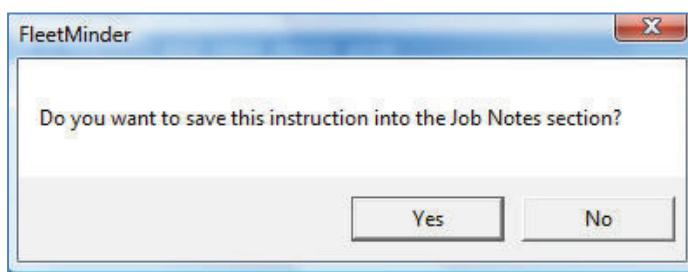
Highlight the instruction that you wish to delete.

Click **Remove**.



Delete an Instruction

A message box will then appear asking if you want to save the deleted instruction in the notes section of the Job Card.

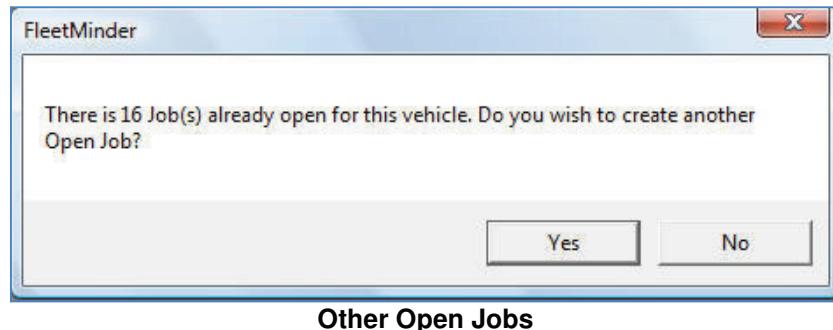


Save Deleted Instruction

Click **Yes** to save the deleted instruction in the Notes section of the Job Card, click **No** to discard the deleted instruction.

Create a New Job Card if There is Already One Open for a Vehicle

If there are any job cards already open for a vehicle a message will appear on the screen querying if you want to create another job card.



Other Open Jobs

There is no limit on the number of job cards that can be created at the one time against one vehicle.

If you do not want to create a new job card, click **No**.

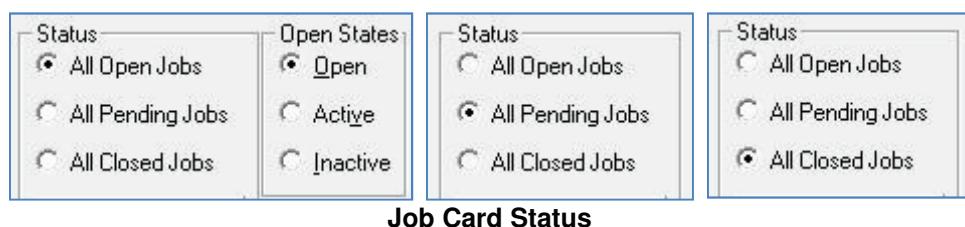
If you want to create another job card, click **Yes**.

View Jobs with Alternative Status

Enter the Job Cards section from the main menu.



You will have a display of all open job cards with a status of Open.



Status

- Open – Job Cards that are created and available to be worked on.
- Pending – Job Cards that are finished but haven't been signed off.
- Closed – Job Cards that are signed off and the invoice released.

The Open status can be further sub-divided into 3 states.

- Open – Default state when a Job Card is created.
- Active – Jobs that are currently "clocked in" in the workshop.
- Inactive – Jobs that have been worked on in the workshop.

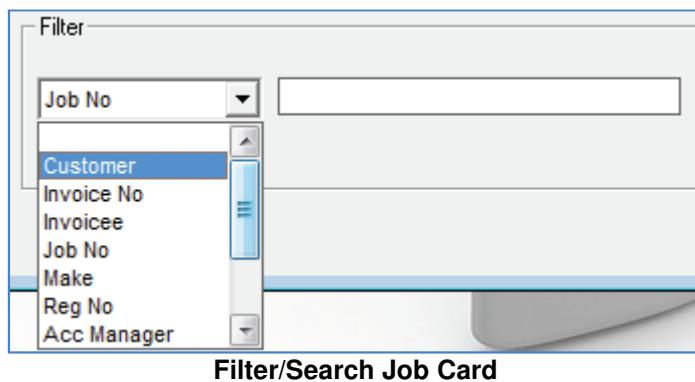
Note – the Active and Inactive states are only used in sites that use the Workshop Module.

All Pending Jobs and *All Closed Jobs* do not have any sub-states.

Click each radio-button as appropriate for the search you wish to carry out and then the list of Job Cards will automatically refresh with the appropriate selection.

Search for a Specific Job Card

In the Job Card section there is a facility for filtering the job cards.



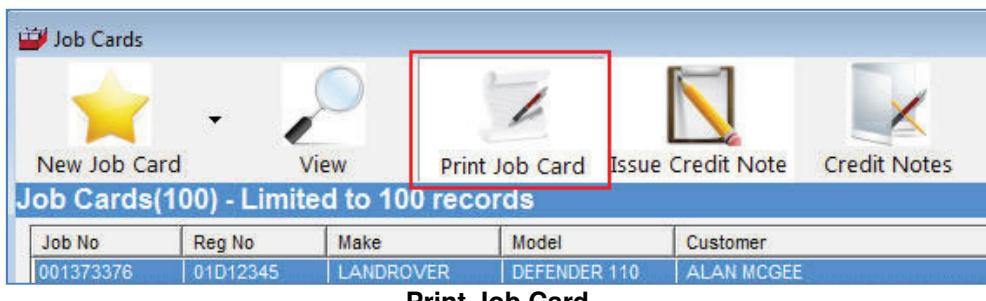
You have the selection of picking from:

- **Customer**
- **Invoice No**
- **Invoicee**
- **Job No**
- **Make**
- **Reg. No**
- **Acc Manager**

You can select any of these fields. For *Customer*, *Invoicee*, *Make* and *Account Manager* you can start to type in the name and then make your selection from the drop-down menu.

However, with *Invoice No.*, *Job No.* and *Reg. No.* you must put in the full number and click on **Go** to retrieve the required information.

Re-Print a Job Card



Print Job Card

Select the job card that you wish to print and then click on **Print Job Card**.

Alternatively, you can enter the Job Card by double-clicking on it and then choose **Report** from the Job Card menu.



A report preview is displayed on the screen for that job card.



Job Card

To print it, click on **Print**, select the printer (it will automatically pick the default printer from your PC unless you pick otherwise) and then click **Print**.

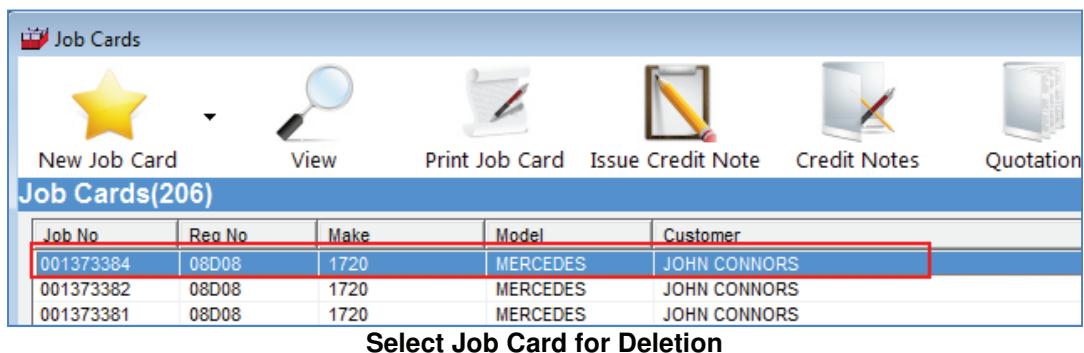
The job card will be printed and you can then close the screen by clicking the  in the top right corner.

Delete a Job Card

NOTE – this facility is only available if enabled in System Parameters.

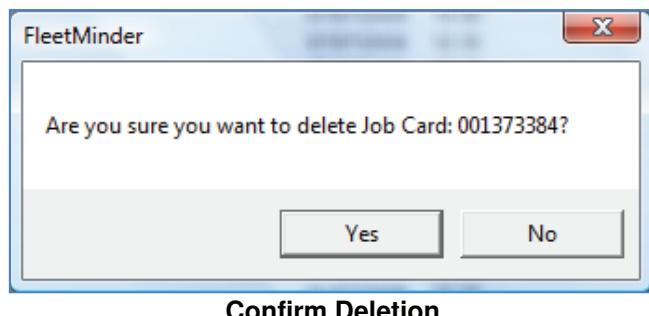
A Job Card can only be deleted if there are no parts or labour assigned to the Job Card.

Select the Job Card that you would like to delete by left-clicking on it once.



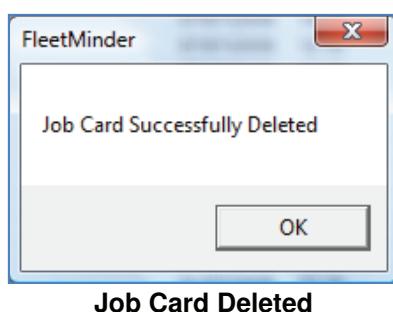
To delete the Job Card, right-click on it.

A message box will appear asking you to confirm the deletion.

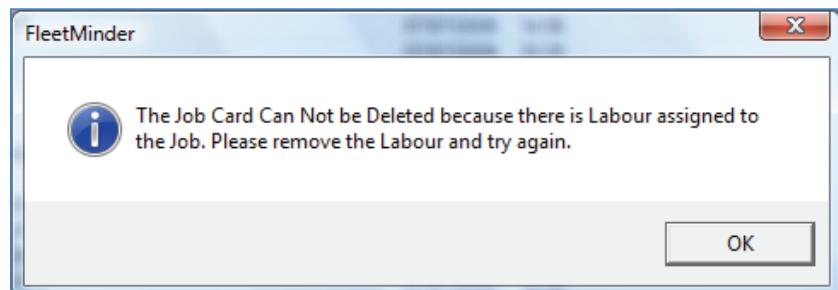


Click **Yes** to confirm the deletion or click **No** to cancel.

A message box will appear confirming the Job Card has been deleted.



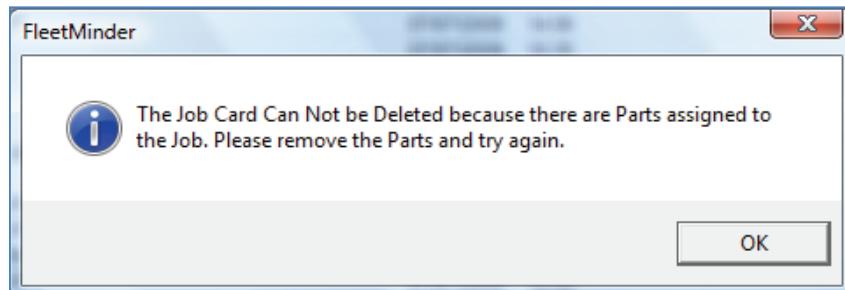
If there is labour assigned to the Job Card then an error message will appear to notify you.



Labour Error

The labour must be manually removed from the Job Card before it can be deleted.

If there are parts assigned to the Job Card then an error message will appear to notify you.

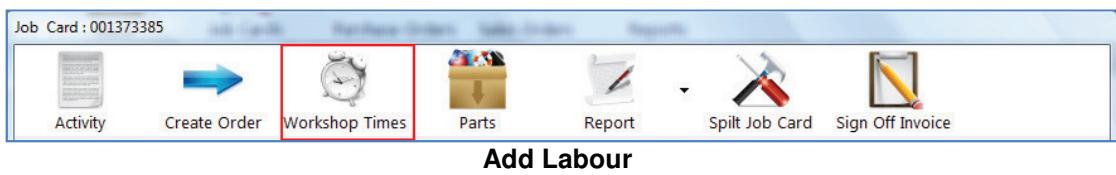


Parts Error

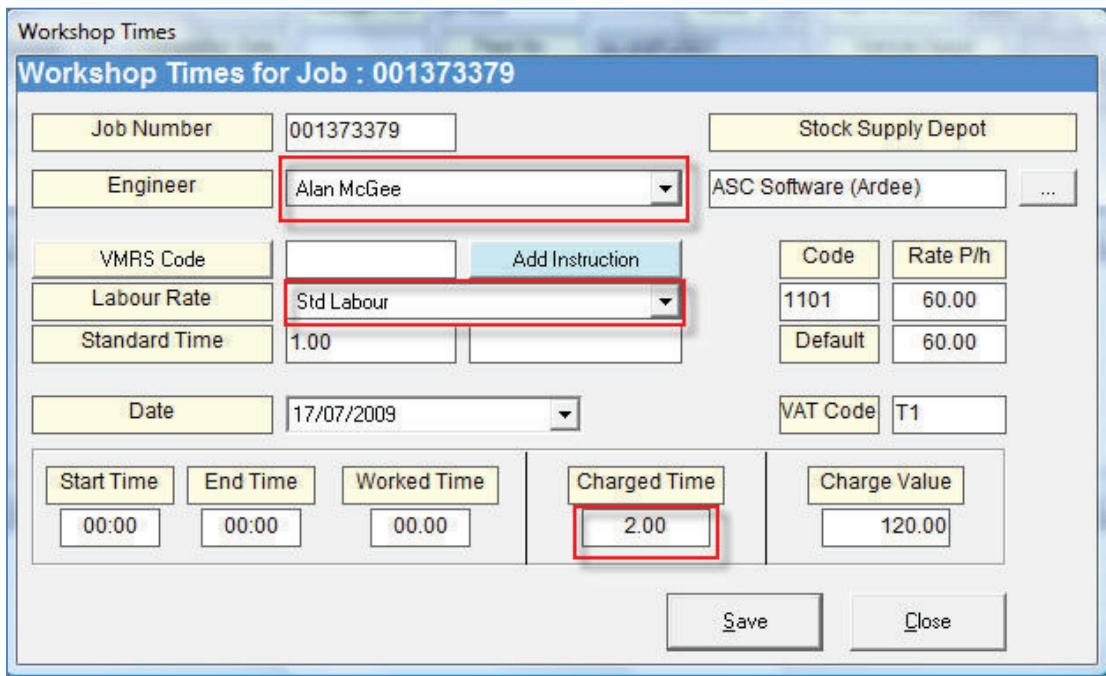
The parts must be manually removed from the Job Card before it can be deleted.

Add Labour to a Job Card

To add labour to a Job Card click on **Workshop Times**.



- First select the *Engineer* from the dropdown menu.
- Then choose the *Labour Rate* from the dropdown menu.
- Finally, enter the *Worked Time* and *Charged Time*.



Optionally, if more detail is required then you can add:

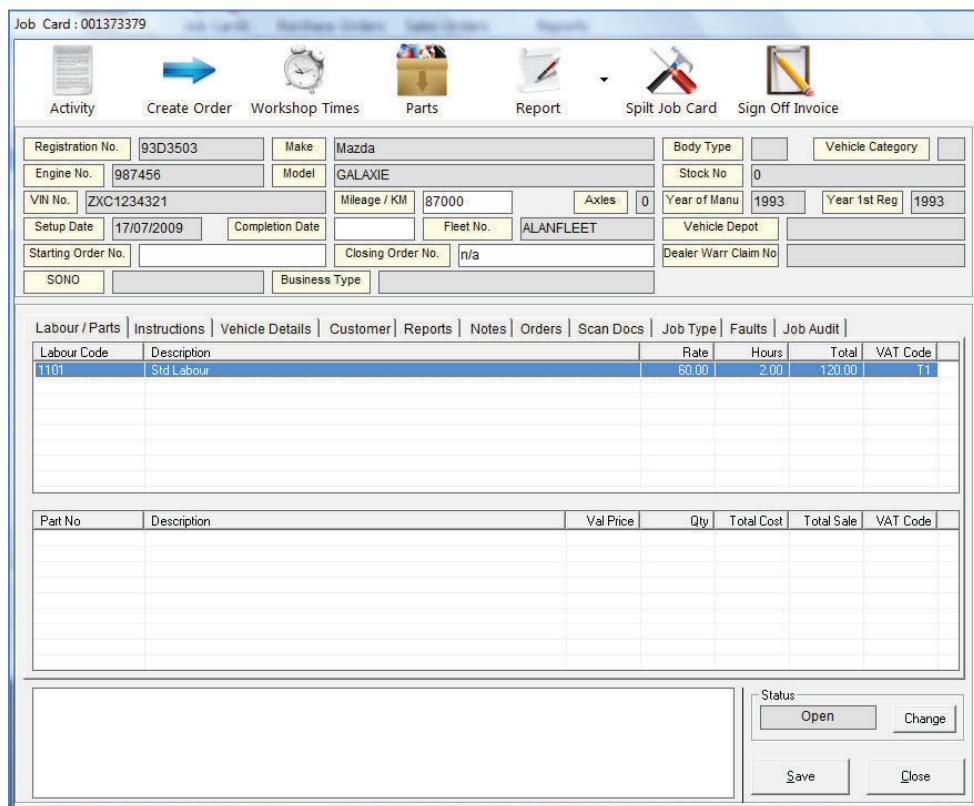
- VMRS Code – by clicking on *VMRS Code*
- Instructions – by clicking on *Add Instruction*
- Date – by clicking on the *Date* dropdown menu
- Times – by entering the *Start Time* and *End Time*

Click on **Save** to save the changes or click on **Close** to exit without saving the changes.

The labour will then be added to the Job Card. Additional labour can also be added by repeating this process.

Edit Labour on a Job Card

Open the Job Card on which you would like to edit the Labour:

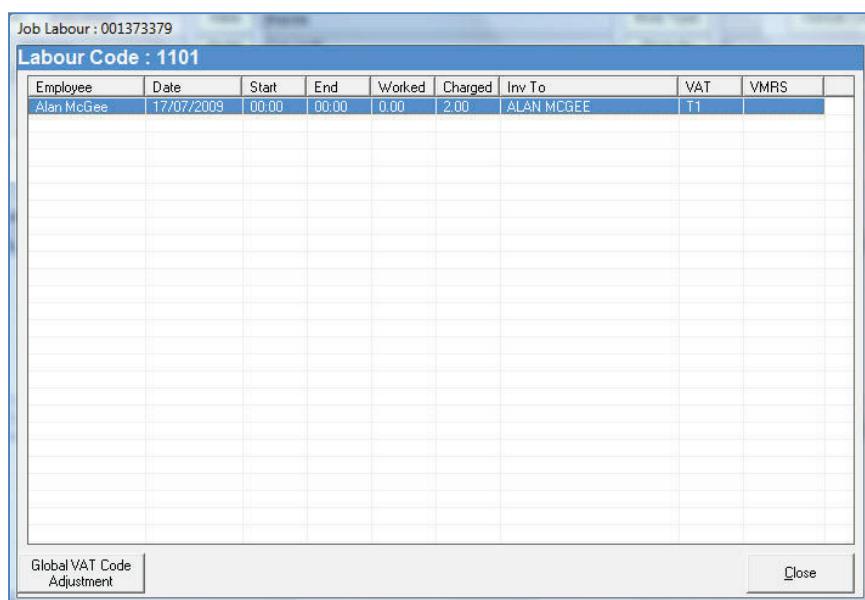


The screenshot shows the 'Job Card' window for job card 001373379. The top menu bar includes 'File', 'Edit', 'View', 'Print', 'Help', and 'Report'. The toolbar contains icons for 'Activity', 'Create Order', 'Workshop Times', 'Parts', 'Report', 'Split Job Card', and 'Sign Off Invoice'. The main area displays vehicle details: Registration No. 93D3503, Make Mazda, Model GALAXIE, Engine No. 987456, VIN No. ZXC1234321, Mileage / KM 87000, Axles 0, Stock No. 0, Year of Manu 1993, Year 1st Reg 1993, Setup Date 17/07/2009, Completion Date, Fleet No. ALANFLEET, Starting Order No., Closing Order No. n/a, Dealer Warr Claim No., SONO, and Business Type. Below this is a table for 'Labour / Parts' with tabs for Instructions, Vehicle Details, Customer, Reports, Notes, Orders, Scan Docs, Job Type, Faults, and Job Audit. The 'Labour' table shows a single entry: Labour Code 1101, Description Std Labour, Rate 60.00, Hours 2.00, Total 120.00, and VAT Code T1. A separate table for 'Parts' is also present. At the bottom are buttons for 'Status' (Open, Change), 'Save', and 'Close'.

Job Card

In the *Labour/Parts* tab, double-click on the Labour that you would like to edit.

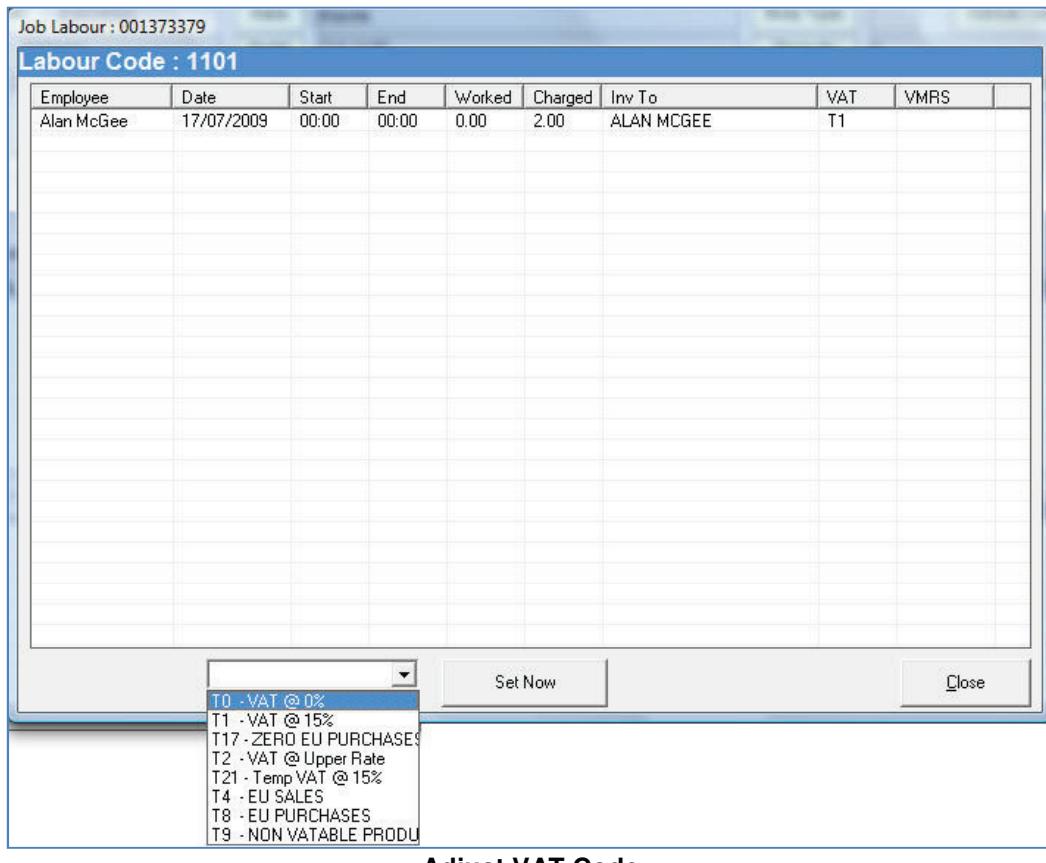
A window will appear with the details of the labour:



The screenshot shows the 'Labour Details' window for labour code 1101. The top bar displays 'Job Labour : 001373379'. The main table shows a single row: Employee Alan McGee, Date 17/07/2009, Start 00:00, End 00:00, Worked 0.00, Charged 2.00, Inv To ALAN MCGEE, VAT T1, and VMRS. At the bottom are buttons for 'Global VAT Code Adjustment' and 'Close'.

Labour Details

On this screen you can edit the VAT on the labour by clicking on **Global VAT Code Adjustment**.



Adjust VAT Code

A dropdown menu will appear allowing you to choose a different VAT code. When you have selected the VAT code click on **Set Now**.

Note – this will change the VAT for all the labour visible on the screen (if there is more than one line).

To edit further details of the labour, double click on the labour line.

The following window will appear:

Edit Job Labour

Labour Code : 1101

Name	Alan McGee	Rate Per Hour
Date	17/07/2009	Add Instruction
		60

Start Time	End Time	Worked Time	Charged Time	Charge Value
00:00	00:00	0.00	2.00	120.00

Invoice To

Set to Same as Vehicle Owner

ALAN MCGEE

Ardee Business Park

Ardee

C.o Louth

ALA08035

Save **Close**

Edit Labour Details

On this screen you can edit the instructions by clicking on **Add Instruction**. This will bring you to the Instructions menu.

You can manually edit the:

- Start Time
- End Time
- Worked Time
- Charged Time

To do this simply enter a new value.

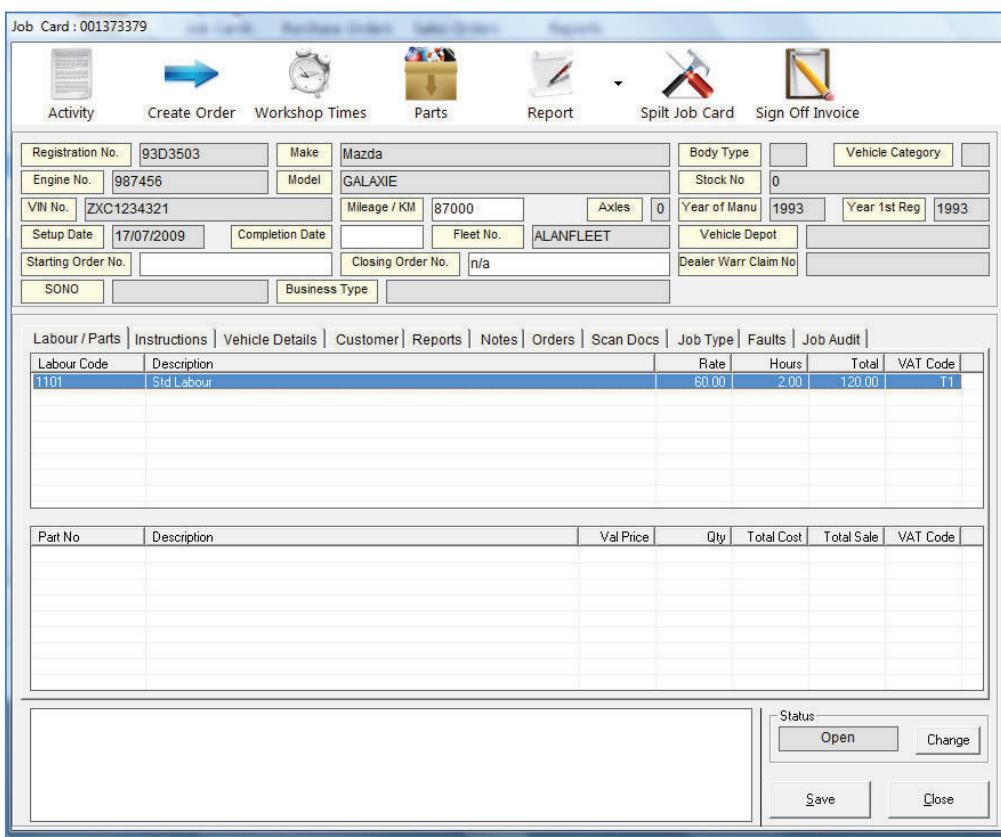
To change the invoicee for this labour, enter part or all of the name into the *Invoice To* section and click on **Enter**.

The labour rate and Engineer cannot be edited. If they must be edited then the labour must be deleted and re-entered.

To save your changes click on **Save** or to exit without saving click on **Close**.

Delete Labour on a Job Card

Open the Job Card on which you would like to edit the Labour:



The screenshot shows the 'Job Card' window with the following details:

Vehicle Details:

- Registration No: 93D3503
- Engine No: 987456
- VIN No: ZXC1234321
- Setup Date: 17/07/2009
- Completion Date:
- Starting Order No:
- SONO
- Make: Mazda
- Model: GALAXIE
- Mileage / KM: 87000
- Axles: 0
- Fleet No: ALANFLEET
- Closing Order No: n/a
- Body Type
- Stock No: 0
- Year of Manu: 1993
- Year 1st Reg: 1993
- Vehicle Depot
- Dealer Warr Claim No

Labour List:

Labour Code	Description	Rate	Hours	Total	VAT Code
1101	Std Labour	60.00	2.00	120.00	T1

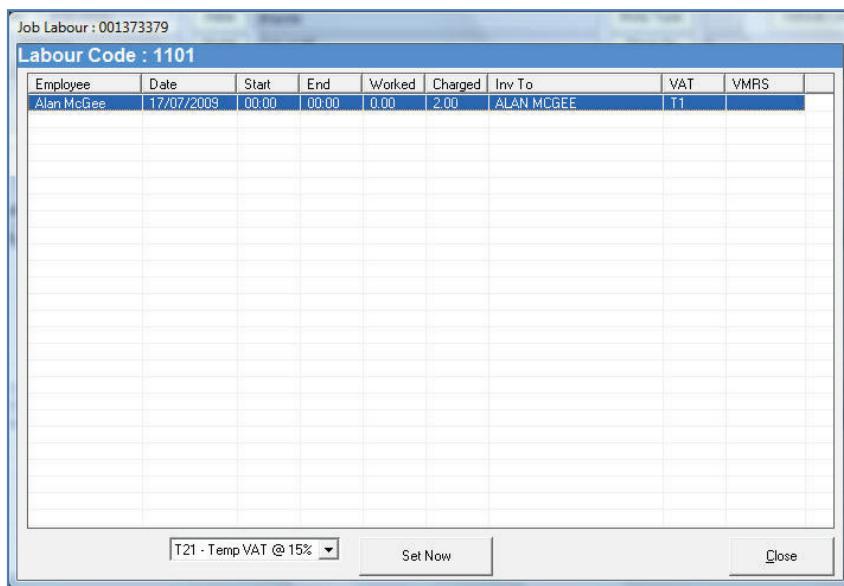
Status: Open

Buttons: Save, Close

Job Card

To delete labour on this Job Card double-click on the labour line.

A window will appear with the details of the labour:



The screenshot shows the 'Labour Details' window with the following details:

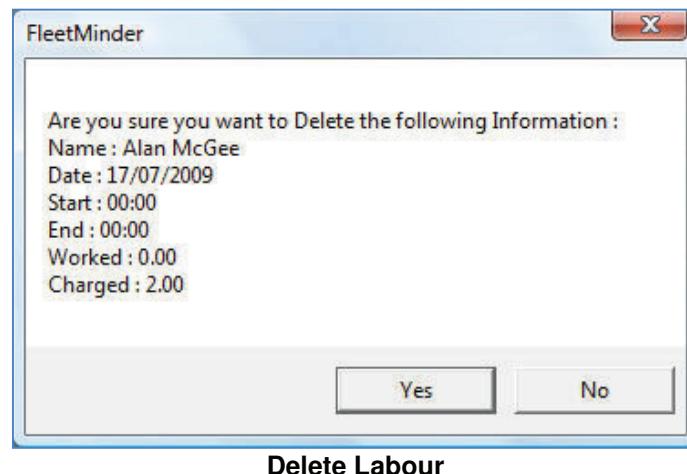
Labour Code: 1101

Employee	Date	Start	End	Worked	Charged	Inv To	VAT	VMRS
Alan McGee	17/07/2009	00:00	00:00	0.00	2.00	ALAN MCGEE	T1	

Buttons: T21 - Temp VAT @ 15%, Set Now, Close

Labour Details

Right-click on the labour line that you would like to delete.
A window will appear asking you to confirm the deletion:



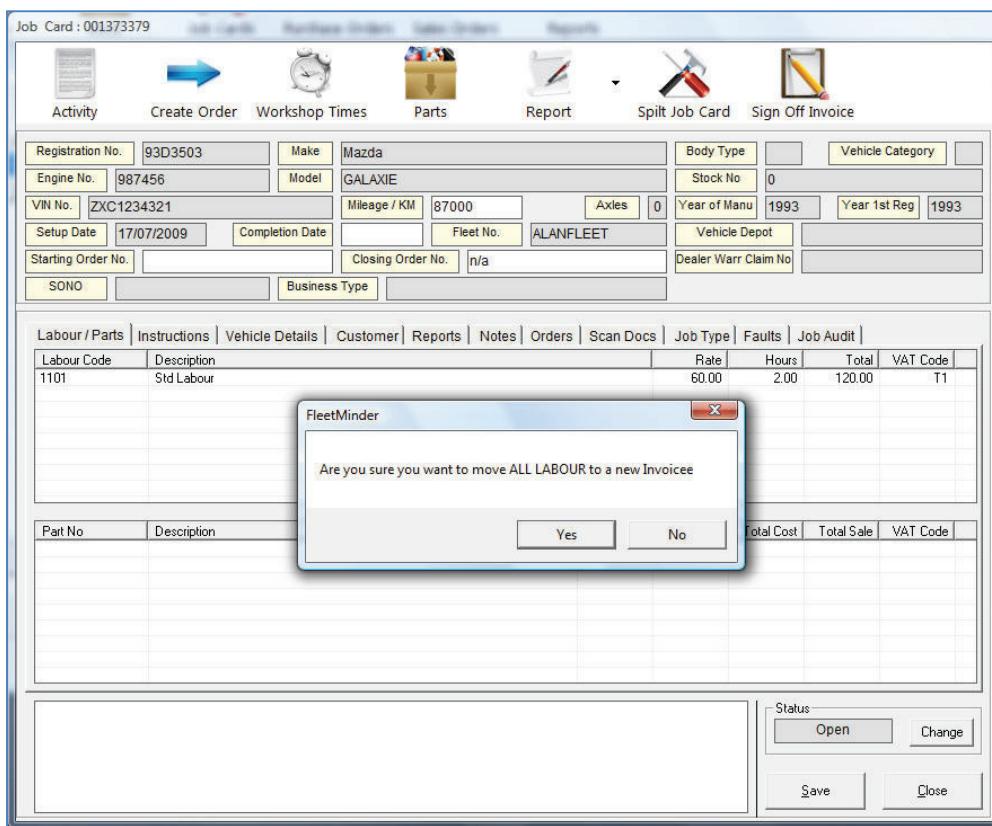
Click on **Yes** to delete the labour or **No** to cancel the change.

A message box will then appear confirming that the labour has been deleted.



Move All Labour to a New Invoicee

Open the Job Card on which you would like to move the Labour to a new invoicee:



The screenshot shows the 'Job Card' interface with various tabs and buttons at the top. The 'Labour / Parts' tab is active. A labour line for 'Std Labour' is listed with a rate of 60.00, hours of 2.00, and a total of 120.00. A 'FleetMinder' dialog box is overlaid on the screen, asking 'Are you sure you want to move ALL LABOUR to a new Invoicee?' with 'Yes' and 'No' buttons. The bottom right corner of the dialog box has an 'X' button.

Job Card

To move Labour to a new invoicee, right-click on a Labour line.

Click **Yes** to move the labour or click **No** to cancel.

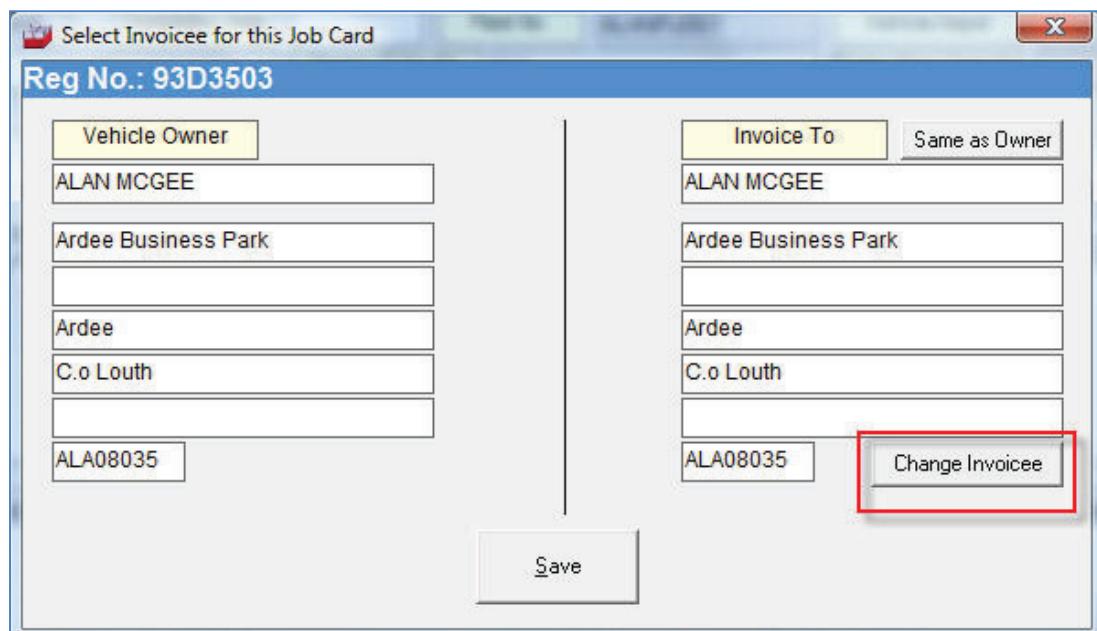
The Invoicee window will then appear.

Select Invoicee for this Job Card

Reg No.: 93D3503

Vehicle Owner	Invoice To
ALAN MCGEE	Same as Owner
Ardee Business Park	
Ardee	
C.o Louth	
ALA08035	Change Invoicee

Save



Select Invoicee

Click on **Change Invoicee**.

A text box will open up underneath, type in all or part of the name of the new invoicee and press **Enter**.

Select Invoicee for this Job Card

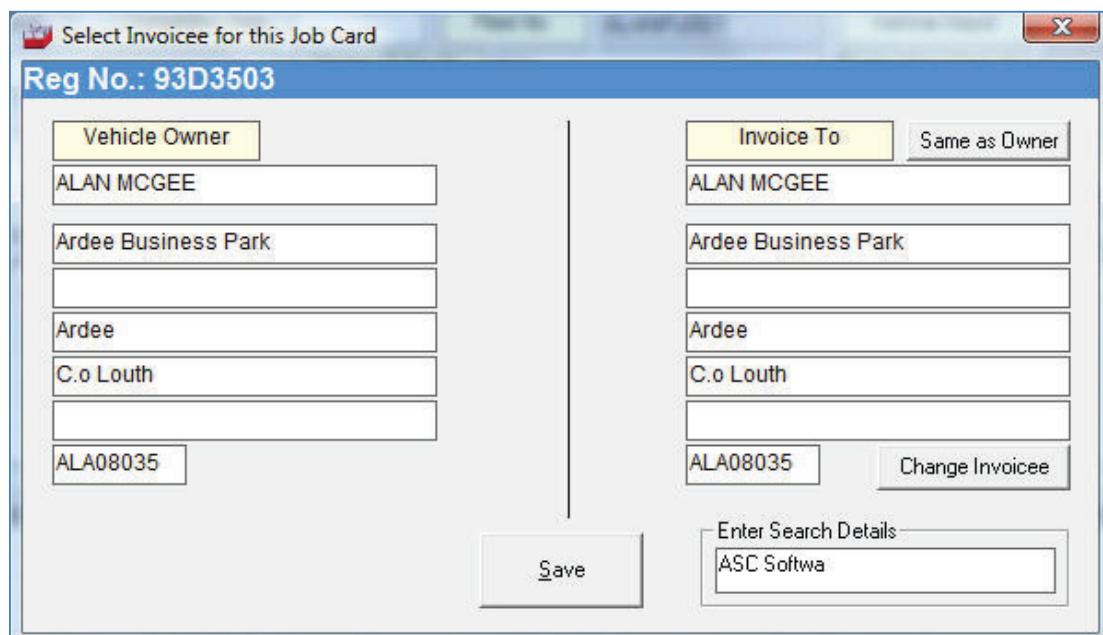
Reg No.: 93D3503

Vehicle Owner	Invoice To
ALAN MCGEE	Same as Owner
Ardee Business Park	
Ardee	
C.o Louth	
ALA08035	Change Invoicee

Save

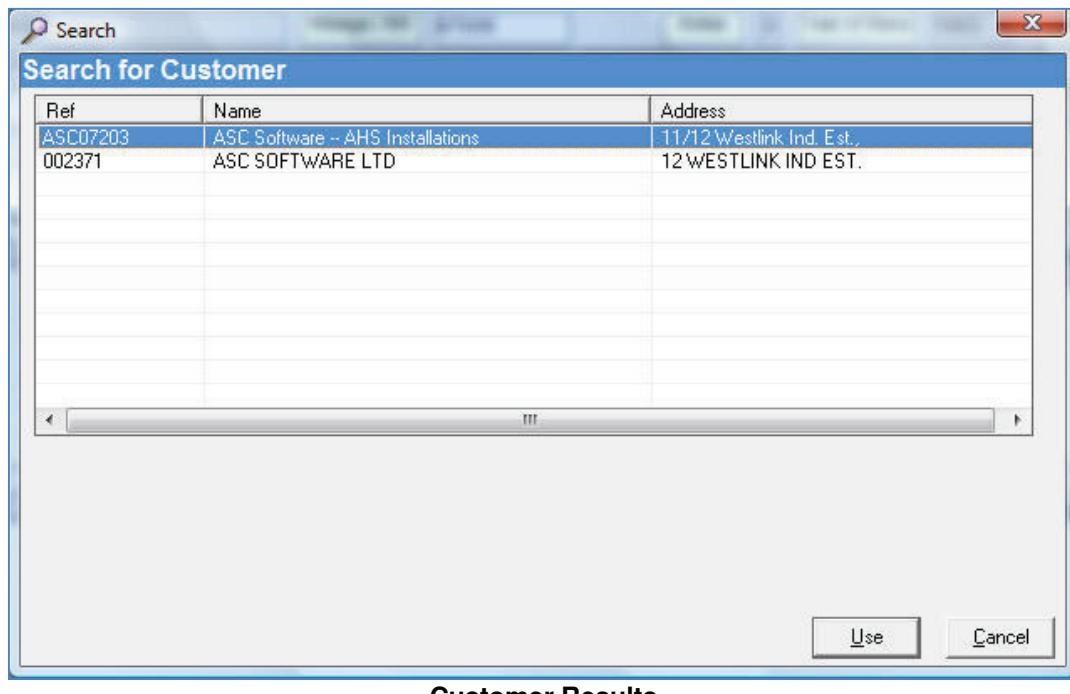
Enter Search Details

ASC Softwa



Search for Invoicee

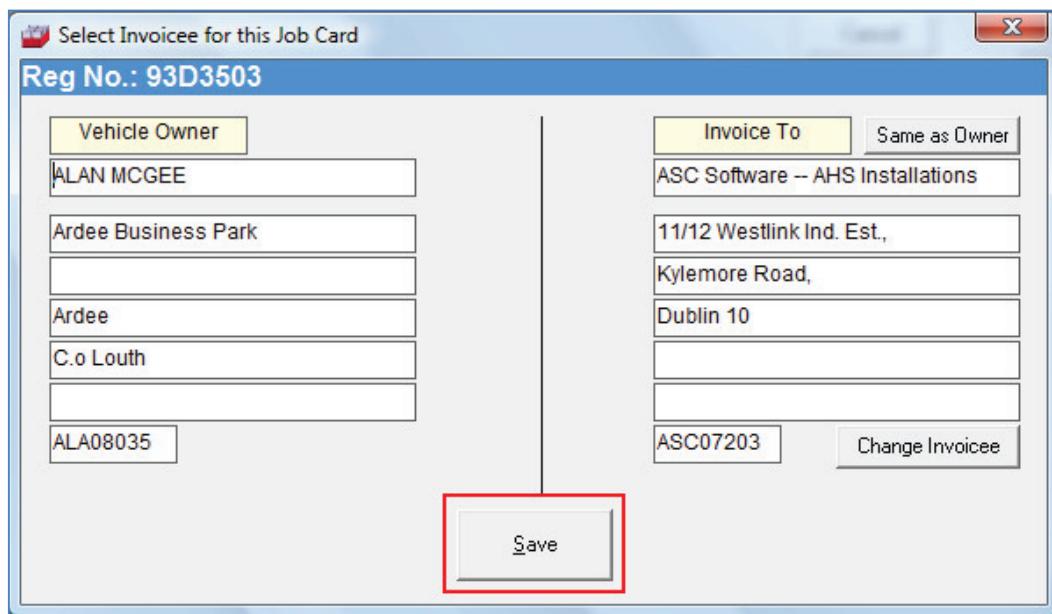
Fleetminder will display a list of customers that match your search query.



Customer Results

Select the customer you would like to use and click on **Use**.

FleetMinder will then update the invoicee details with the new invoicee.



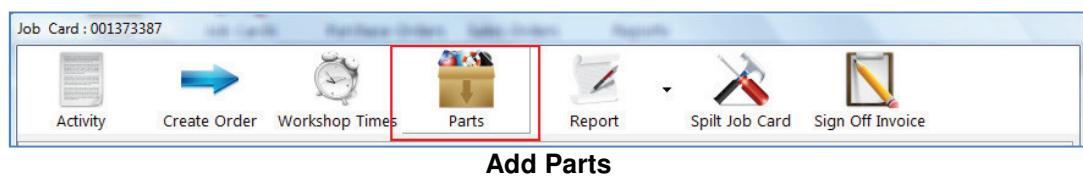
Updated Invoicee

Click on **Save** to save the changes.

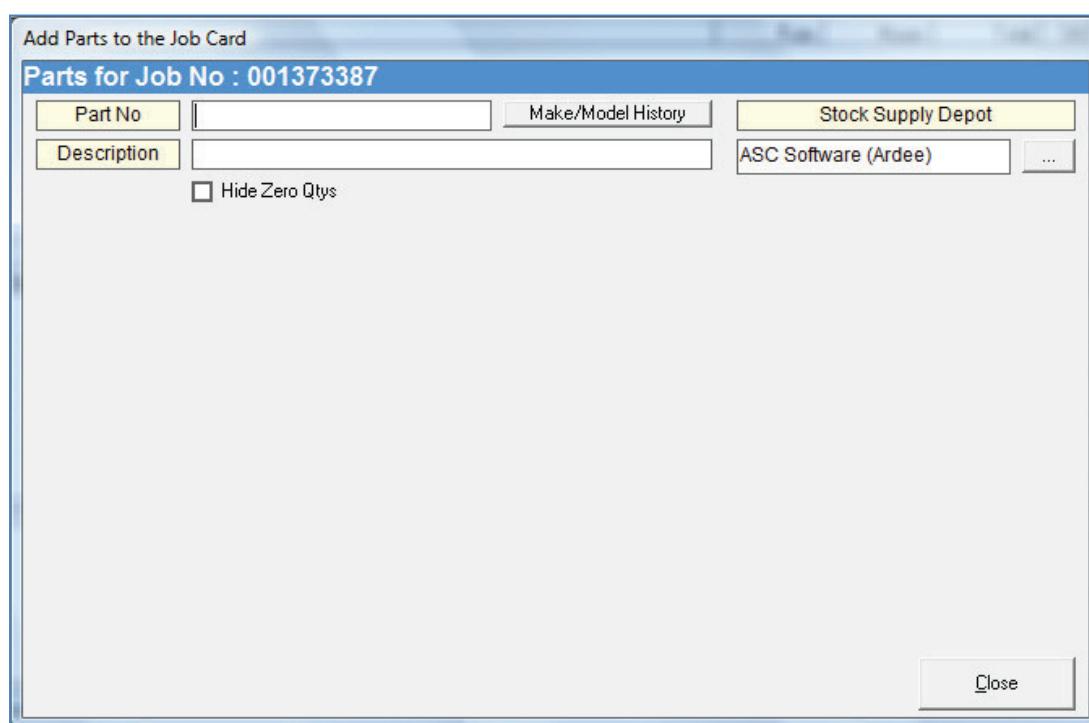
Once the Job Card has been signed off, FleetMinder will automatically create a new Job Card with the labour on it invoiced to the new customer.

Add Parts to a Job Card

To add parts to a Job Card click on **Parts**.



The following window will appear:



Enter in part or all of the *Part Number*, or enter in part or all of the *Description* and click on **Enter**.

A grid will appear with all the entries that match your search query.

Add Parts to the Job Card

Parts for Job No : 001373387

Part No	giz	Make/Model History	Stock Supply Depot	
Description	ASC Software (Ardee)			
<input type="checkbox"/> Hide Zero Qtys				
Parts List				
Part No	Description	Location	Min	Free
GI2001	Gizmo	4505	10	0
GI2M01	New Gizmo	4505	1	0
GI2M02	Another Gizmo	4505	1	0
GI2M099	GI2M099	4310	0	0
GI	GI	4307	0	0
NEWGI2M0	Gizmo01	A.01	1	88

Use **Cancel**

Close

Select Part

Highlight the line with the part that you wish to add and click on **Use**.

Note – the part must be in stock i.e. the figure in the *Free* column must be greater than 0.

On the next screen, enter the quantity of the part that you would like to add to the Job Card:

Add Parts to the Job Card

Parts for Job No : 001373387

Part No	NEWGI2M0	Make/Model History	Stock Supply Depot
Description	Gizmo01	ASC Software (Ardee)	
<input type="checkbox"/> Hide Zero Qtys			
Bin Stock	88	Valuation Price	10.00
Location	A.01	% Margin	23.0769 %
Qty Required	<input type="text" value="1"/>	% Discount	0.00 %
Serial Number Required	<input type="checkbox"/>	Selling Price	13.00
		Total Sale	13.0000
<input type="checkbox"/> Selling Price Is Preset			
Select Fault	00 - No Fault Selected		
Save			Close

Close

Enter Quantity

Click on **Save** and the part will be added to the Job Card.

To add another part to the Job Card, repeat the process by entering another part number. When all the parts have been added, click on **Close**.

Job Card : 001373387

Activity Create Order Workshop Times Parts Report Split Job Card Sign Off Invoice

Registration No.	93D3503	Make	Mazda	Body Type		Vehicle Category	
Engine No.	987456	Model	GALAXIE	Stock No	0		
VIN No.	ZXC1234321	Mileage / KM	87000	Axles	0	Year of Manu	1993
Setup Date	11/08/2009	Completion Date		Fleet No.	ALANFLEET	Year 1st Reg	1993
Starting Order No.		Closing Order No.	n/a	Vehicle Depot			
SONO		Business Type		Dealer Warr Claim No			

[Labour / Parts](#) | [Instructions](#) | [Vehicle Details](#) | [Customer](#) | [Reports](#) | [Notes/SMS](#) | [Orders](#) | [Scan Docs](#) | [Job Type](#) | [Faults](#) | [Job Audit](#)

Labour Code	Description	Rate	Hours	Total	VAT Code

Part No	Description	Val Price	Qty	Total Cost	Total Sale	VAT Code
NEWGIZMO	Gizmo01	10.00	1	10.00	13.00	T9

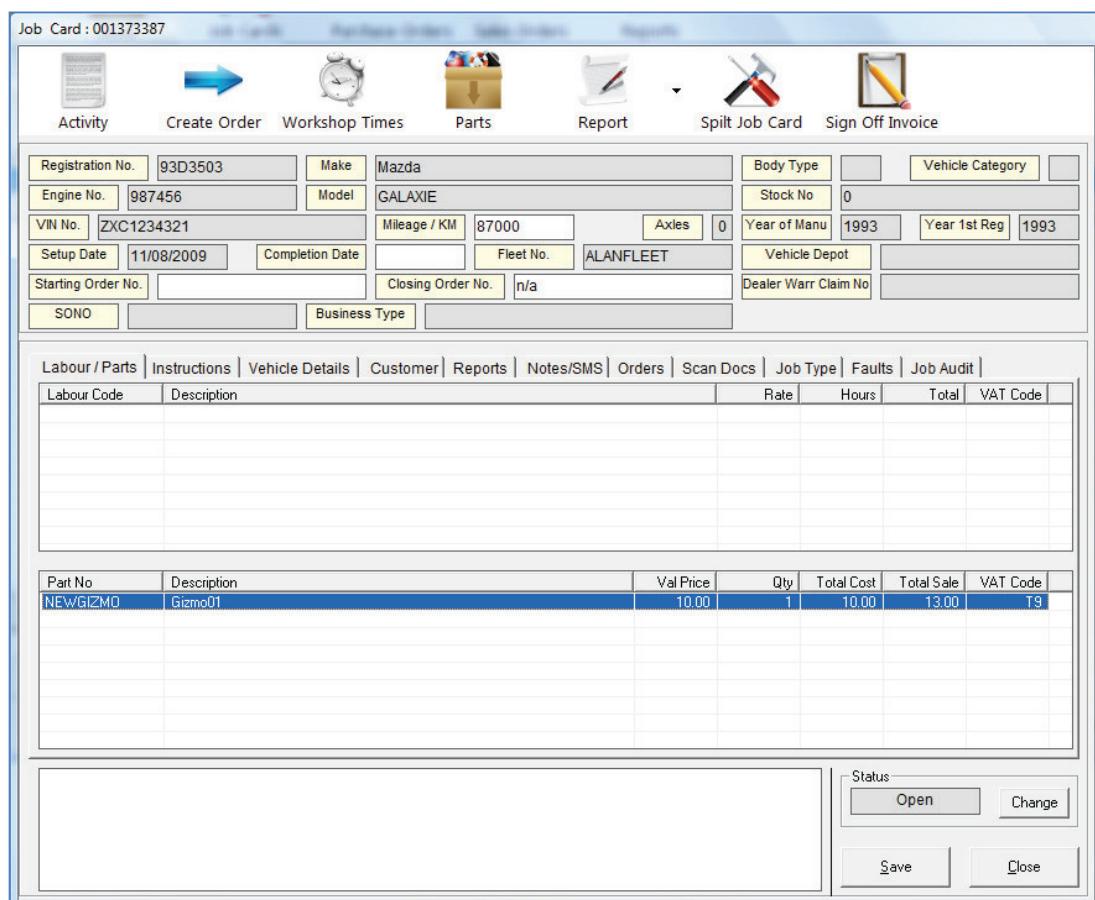
Status: [Open](#) [Change](#)

[Save](#) [Close](#)

Part Added to Job Card

Edit Parts on a Job Card

Open the Job Card on which you would like to edit the part.

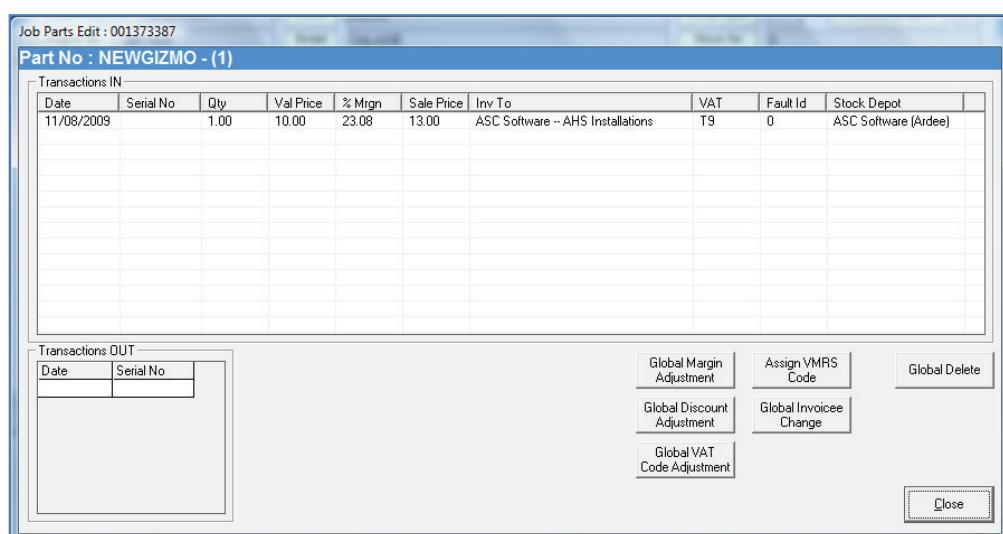


The screenshot shows the 'Job Card' interface with the ID 001373387. The top menu bar includes 'Activity', 'Create Order', 'Workshop Times', 'Parts' (selected), 'Report', 'Split Job Card', and 'Sign Off Invoice'. The vehicle details section shows: Registration No. 93D3503, Make Mazda, Model GALAXIE, Engine No. 987456, Stock No. 0, VIN No. ZXC1234321, Mileage / KM 87000, Axles 0, Year of Manu 1993, Year 1st Reg 1993, Setup Date 11/08/2009, Completion Date, Fleet No. ALANFLEET, Starting Order No., Closing Order No. n/a, and Dealer Warr Claim No. The parts list section shows a single item: Part No. NEWGIZMO, Description Gizmo01, Val Price 10.00, Qty 1, Total Cost 10.00, Total Sale 13.00, and VAT Code T9. Buttons for 'Status' (Open, Change), 'Save', and 'Close' are visible.

Part on a Job Card

Double-click on the part you want to edit.

The Job Parts Edit screen will appear.



The screenshot shows the 'Job Parts Edit' screen for part NEWGIZMO. The top header shows 'Job Parts Edit : 001373387' and 'Part No : NEWGIZMO - (1)'. The 'Transactions IN' section displays a single transaction: Date 11/08/2009, Serial No., Qty 1.00, Val Price 10.00, % Mrgn 23.08, Sale Price 13.00, Inv To ASC Software -- AHS Installations, VAT T9, Fault Id 0, and Stock Depot ASC Software (Ardee). The 'Transactions OUT' section is empty. On the right, buttons for 'Global Margin Adjustment', 'Assign VMRS Code', 'Global Discount Adjustment', 'Global Invoicee Change', 'Global VAT Code Adjustment', and 'Global Delete' are visible, along with a 'Close' button.

Edit Part

On this screen the following options are available:

- Global Markup Adjustment
- Global Discount Adjustment
- Global VAT Code Adjustment
- Assign VMRS Code
- Global Invoicee Change
- Global Delete

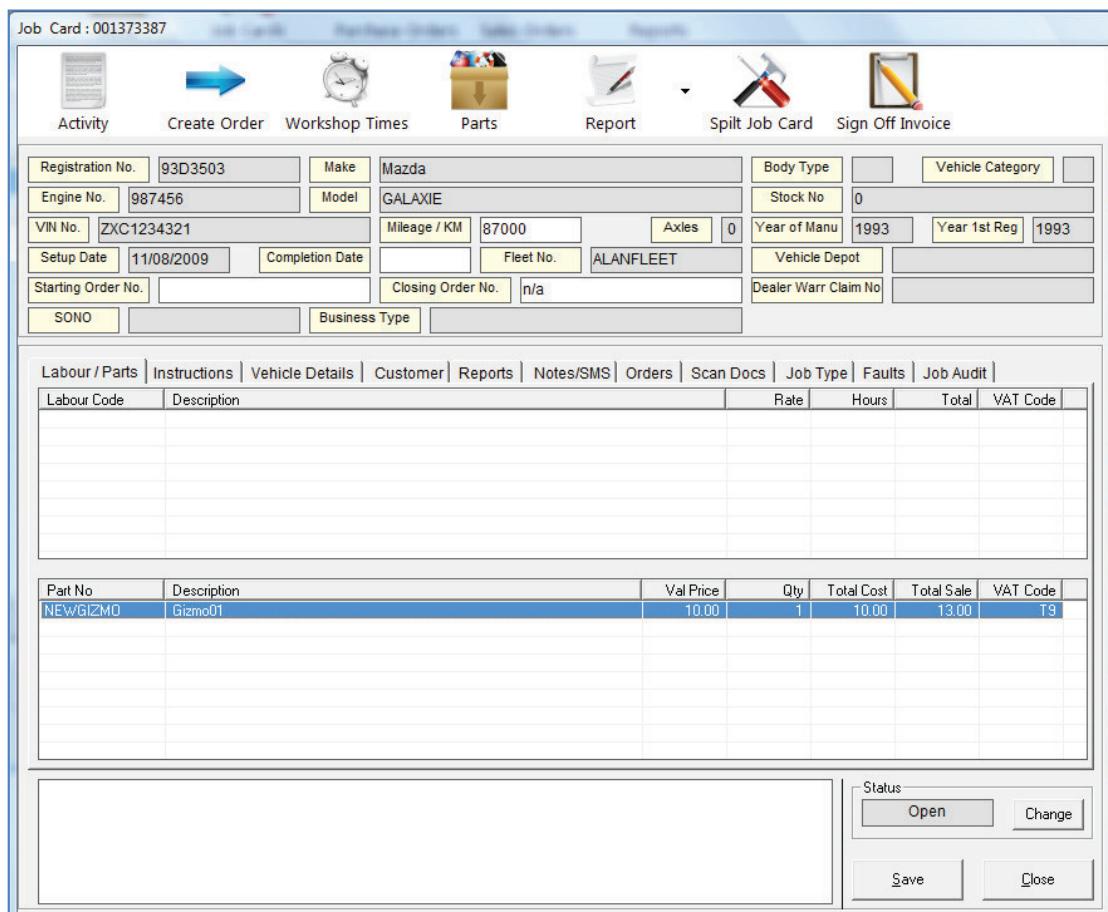
To change any of these values simply click on the button and enter your new value.

Note – any changes you make will be made to all parts that are shown on this screen.

Click **Close** to finish.

Delete Parts on a Job Card

Open the Job Card on which you would like to delete the part.

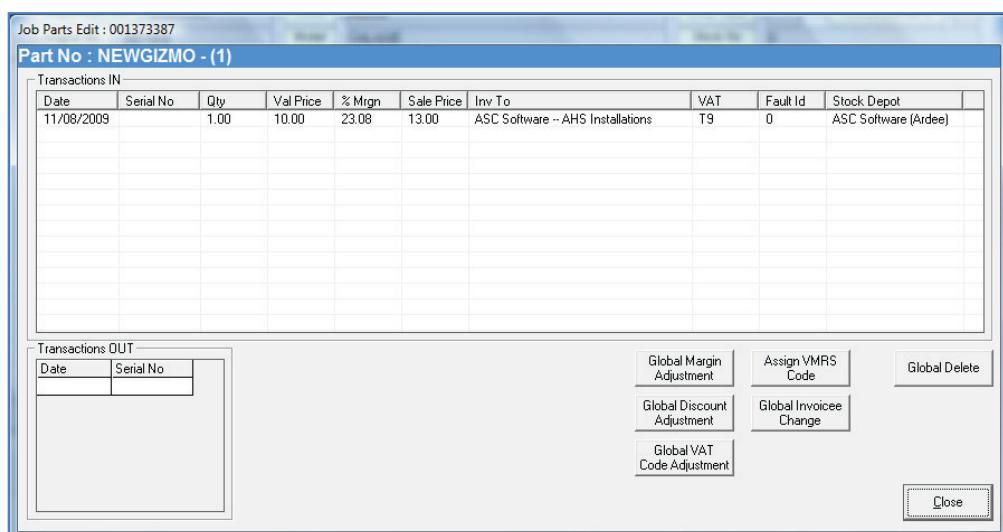


The screenshot shows the 'Job Card' interface for job number 001373387. The top navigation bar includes icons for Activity, Create Order, Workshop Times, Parts, Report, Split Job Card, and Sign Off Invoice. The main data entry area contains fields for Registration No. (93D3503), Make (Mazda), Model (GALAXIE), VIN No. (ZXC1234321), Mileage / KM (87000), Axles (0), Year of Manu (1993), Year 1st Reg (1993), Setup Date (11/08/2009), Completion Date, Fleet No. (ALANFLEET), Vehicle Depot, Starting Order No., Closing Order No. (n/a), Dealer Warr Claim No., SONO, and Business Type. Below this is a navigation bar with links to Labour / Parts, Instructions, Vehicle Details, Customer, Reports, Notes/SMS, Orders, Scan Docs, Job Type, Faults, and Job Audit. The 'Labour / Parts' section displays a table with columns for Labour Code, Description, Rate, Hours, Total, and VAT Code. A single row is shown for 'NEWGIZMO' with a description of 'Gizmo01', a rate of 10.00, and a total of 10.00. The 'Status' section on the right includes buttons for Open, Change, Save, and Close. The entire window has a blue border.

Part on a Job Card

Double-click on the part you want to delete.

The Job Parts Edit screen will appear.

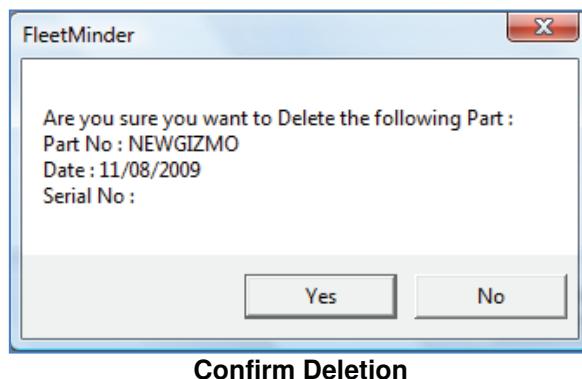


The screenshot shows the 'Job Parts Edit' window for part number NEWGIZMO. The title bar reads 'Job Parts Edit : 001373387'. The main area is titled 'Part No : NEWGIZMO - (1)'. It displays a table for 'Transactions IN' with columns for Date, Serial No, Qty, Val Price, % Mrgn, Sale Price, Inv To, VAT, Fault Id, and Stock Depot. One row is shown for 11/08/2009 with a quantity of 1.00 and a sale price of 13.00. Below this is a large empty table area. The bottom right of the window contains buttons for Global Margin Adjustment, Assign VMRS Code, Global Delete, Global Discount Adjustment, Global Invoicee Change, Global VAT Code Adjustment, and a 'Close' button. The entire window has a blue border.

Delete Part

To delete a part right-click on the line that contains the part.

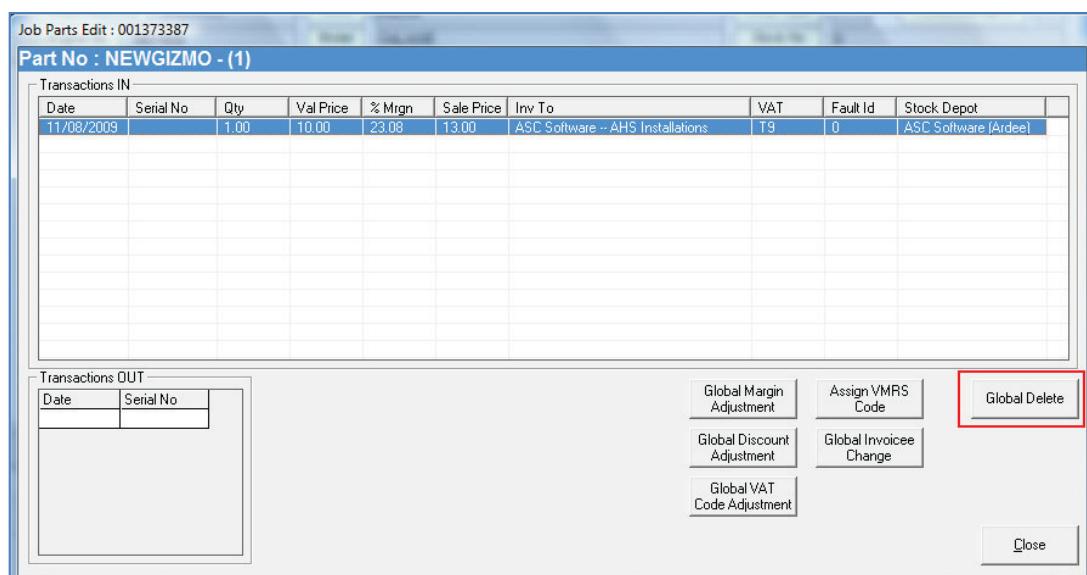
A message box will appear asking you to confirm the deletion.



Confirm Deletion

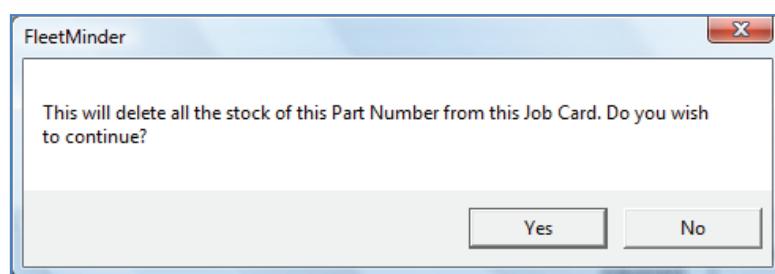
Click **Yes** to delete the part or click **No** to cancel.

If you want to delete all the parts on a Job Card click on the **Global Delete** button.



Global Delete

A message box will appear asking you to confirm the global deletion.

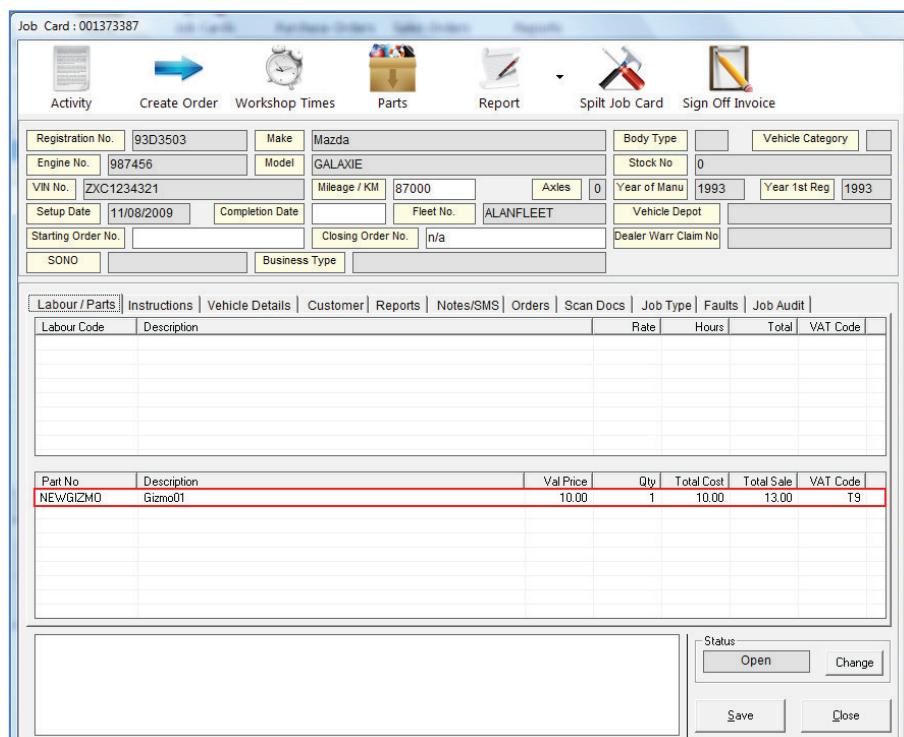


Confirm Global Delete

Click **Yes** to delete the parts or click **No** to cancel.

Move All Parts to a New Invoicee

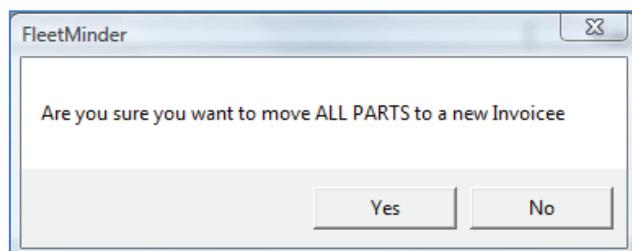
Open the Job Card on which you would like to move the Labour to a new invoicee:



The screenshot shows the 'Job Card' window with the identifier 'Job Card : 001373387'. The top menu bar includes icons for Activity, Create Order, Workshop Times, Parts, Report, Split Job Card, and Sign Off Invoice. The main data entry area contains fields for Registration No. (93D3503), Make (Mazda), Model (GALAXIE), VIN No. (ZXC1234321), Mileage / KM (87000), Axles (0), Stock No (0), Year of Manu (1993), Year 1st Reg (1993), Vehicle Depot, and Dealer Warr Claim No. The 'Labour / Parts' tab is selected, showing a table with columns: Labour Code, Description, Rate, Hours, Total, and VAT Code. A single row is present with Part No. NEWGIZMO and Description Gizmo01, with values 10.00, 1, 10.00, 13.00, and T9 respectively. The bottom right corner of the window has buttons for Status (Open, Change), Save, and Close.

Part on a Job Card

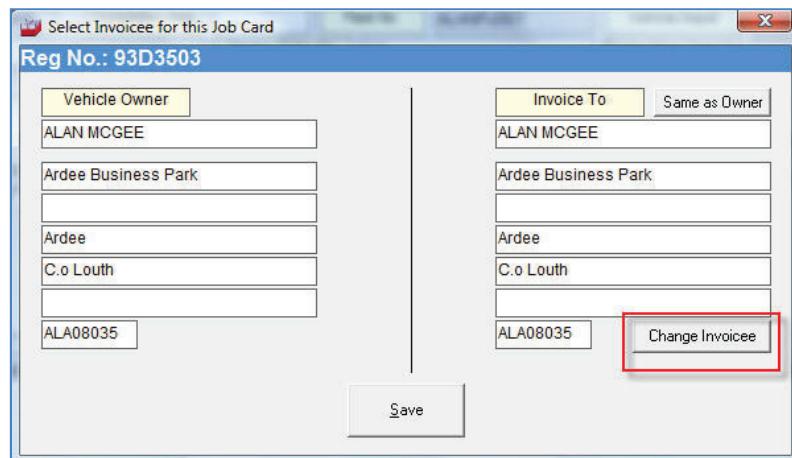
To move parts to a new invoicee, right-click on a part line.



Confirm Parts Move

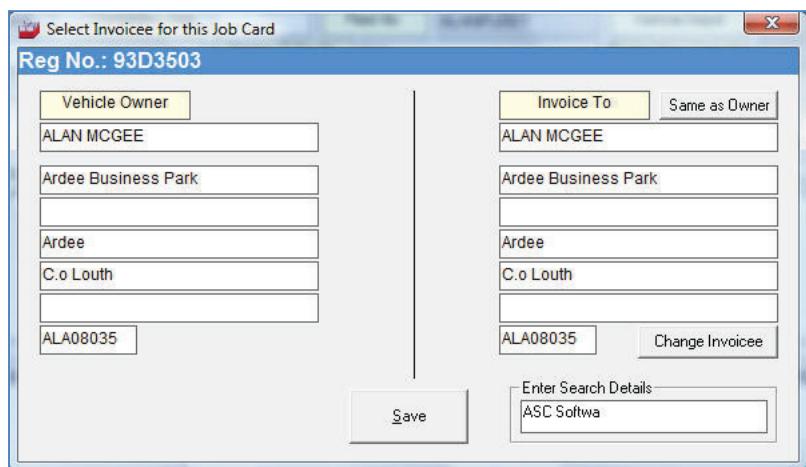
Click **Yes** to move the parts or click **No** to cancel.

The Invoicee window will then appear.



Select Invoicee

Click on **Change Invoicee**. A text box will open up underneath, type in all or part of the name of the new invoicee and press **Enter**.



Search for Invoicee

Fleetminder will display a list of customers that match your search query.

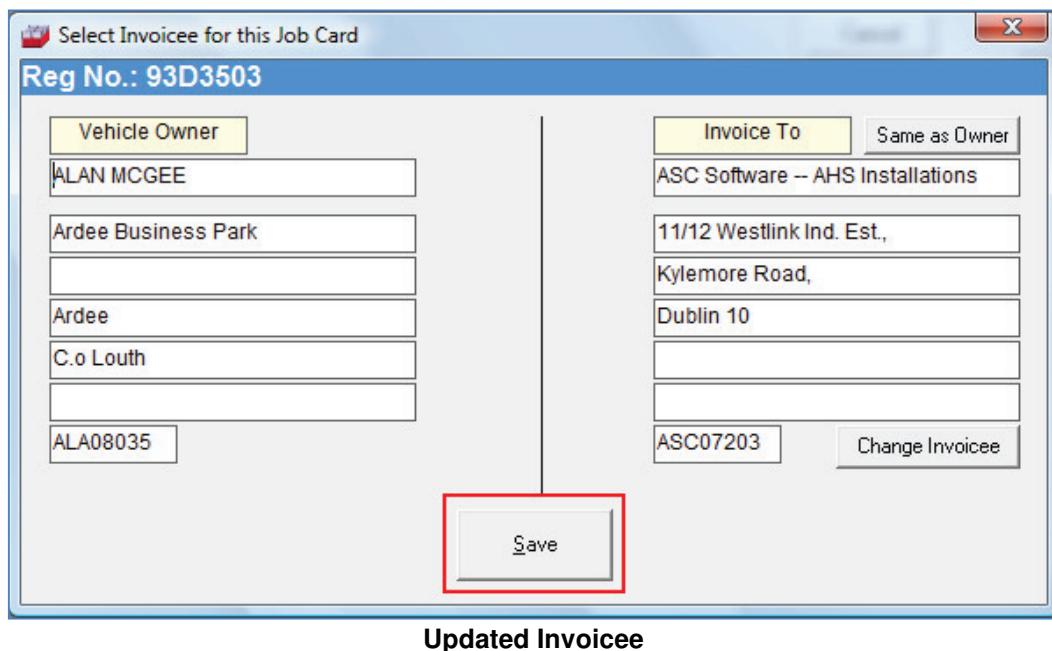
Search for Customer		
Ref	Name	Address
ASC07203	ASC Software - AHS Installations	11/12 Westlink Ind. Est.,
002371	ASC SOFTWARE LTD	12 WESTLINK IND EST.

Use Cancel

Customer Results

Select the customer you would like to use and click on **Use**.

FleetMinder will then update the invoicee details with the new invoicee.



Updated Invoicee

Click on **Save** to save the changes.

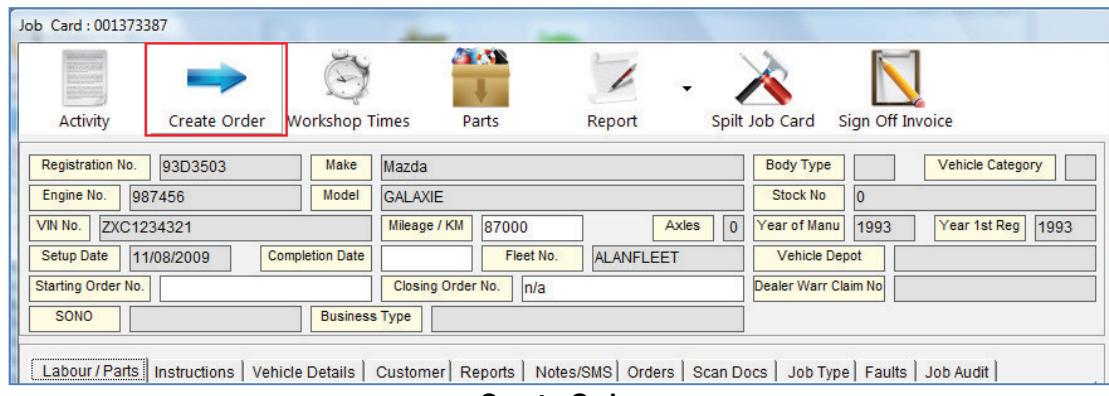
Once the Job Card has been signed off, FleetMinder will automatically create a new Job Card with the parts on it invoiced to the new customer.

Create a Purchase Order Within a Job Card

If a part is not in stock you can create a Purchase Order from within the Job Card to order a part in solely for that job.

The Purchase Order is created using the same process as a standard Purchase Order, the difference is that when the part is received it is added to the Job Card, not added to stock.

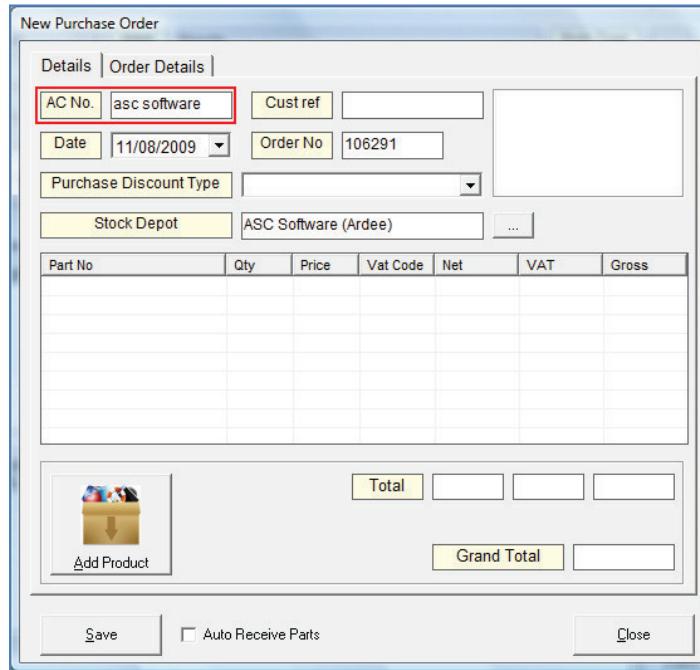
To create the Purchase Order, open the Job Card and click on **Create Order**.



Create Order

The standard Purchase Order screen is displayed.

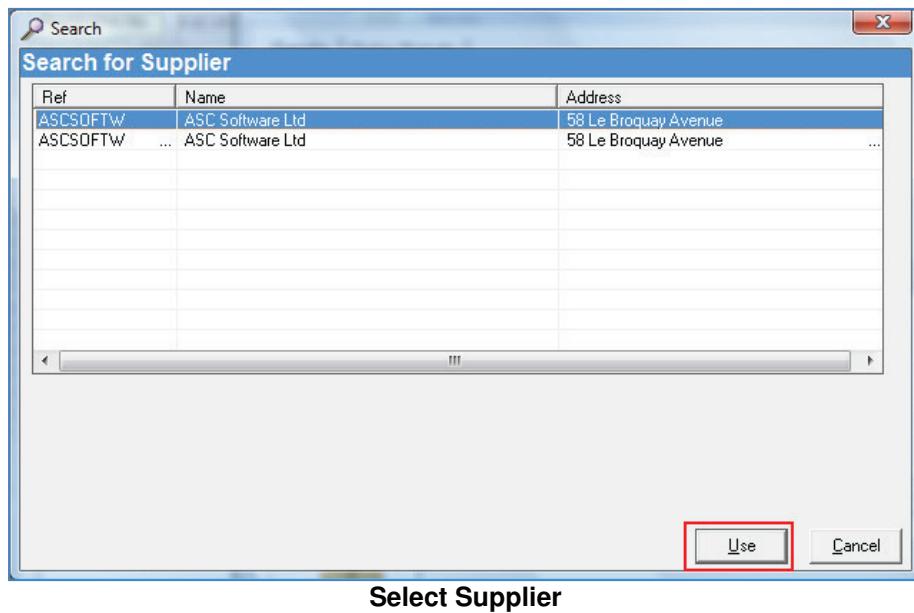
Type in all or part of the Suppliers name in the text box mark A/C No and press **Enter**.



The screenshot shows the 'New Purchase Order' dialog box. It has tabs for 'Details' and 'Order Details'. The 'AC No.' field is highlighted with a red box. Other fields include 'Cust ref', 'Date' (11/08/2009), 'Order No' (106291), 'Purchase Discount Type', 'Stock Depot' (ASC Software (Ardee)), and a table for 'Part No' with columns for Qty, Price, Vat Code, Net, VAT, and Gross. At the bottom, there is a 'Total' button, a 'Grand Total' button, an 'Add Product' button, and buttons for 'Save', 'Auto Receive Parts', and 'Close'.

Enter Customer

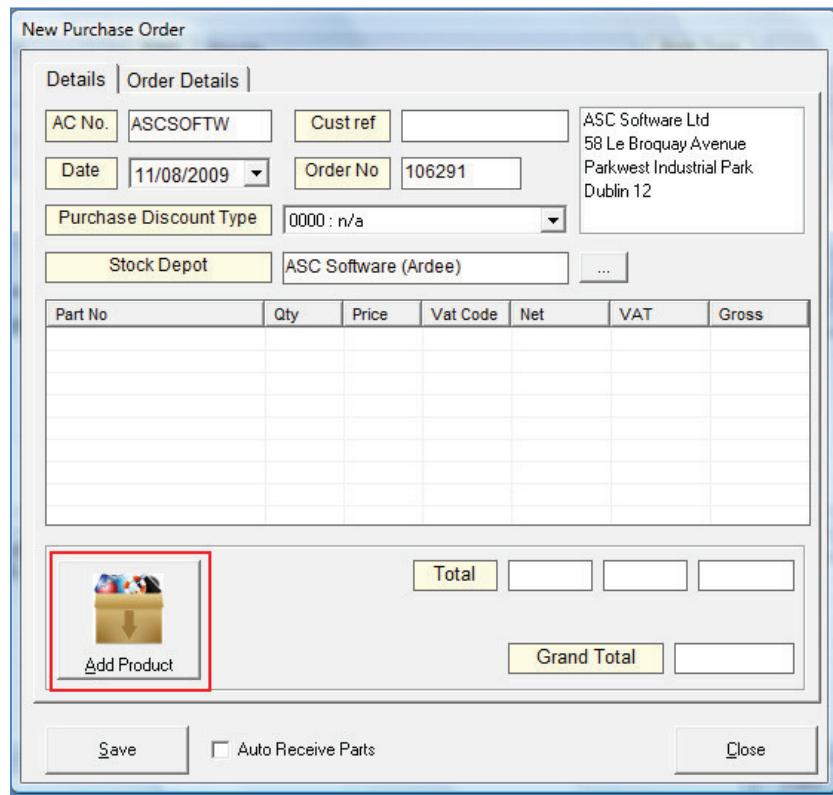
A list of suppliers matching the search query will be displayed.



Select Supplier

Select the supplier that you want to use and click on **Use**.

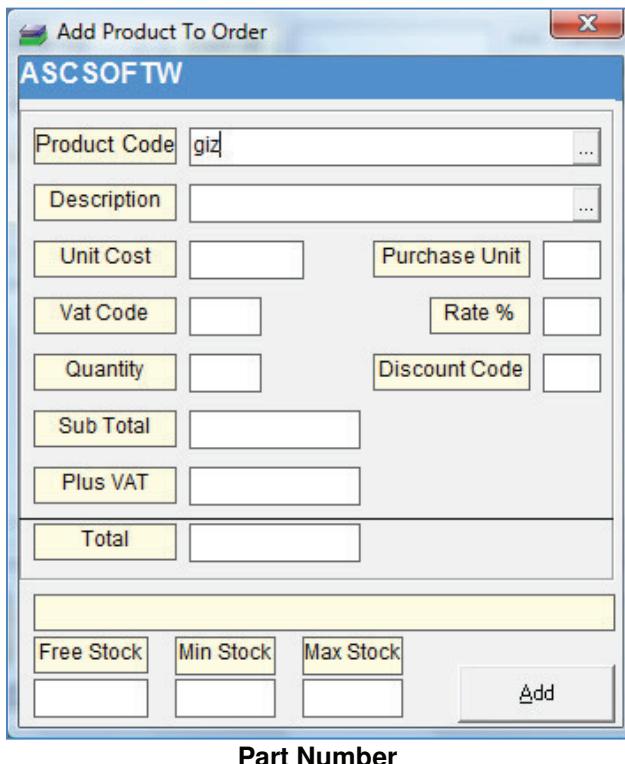
To add a part to the purchase order click on **Add Product**.



Add Product

Type in all or part of the *Product Code*, or all or part of the *Description* and press **Enter**.

Alternatively, click on  at the end of the *Product Code* text box to display a full list of part from this supplier.



Product Code 

Description

Unit Cost Purchase Unit

Vat Code Rate %

Quantity Discount Code

Sub Total

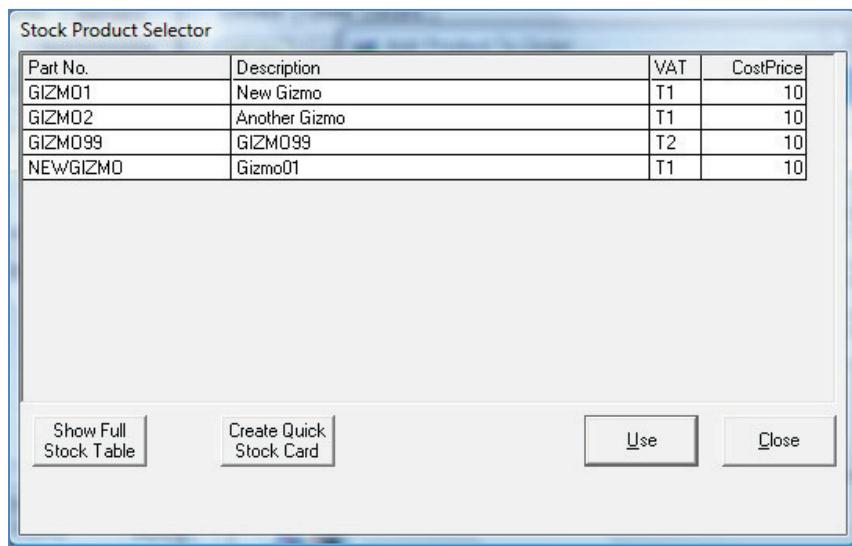
Plus VAT

Total

Free Stock Min Stock Max Stock Add

Part Number

A list of parts matching the search query will be displayed.



Part No.	Description	VAT	CostPrice
GIZM01	New Gizmo	T1	10
GIZM02	Another Gizmo	T1	10
GIZM099	GIZM099	T2	10
NEWGIZMO	Gizmo01	T1	10

Show Full Stock Table Create Quick Stock Card Use Close

Select Part

Select the part that you want to use and click on **Use**.

Next, select the quantity of the part that you want to order for the job then click on **Add**.

The screenshot shows the 'Add Product To Order' dialog box. The 'Product Code' is 'NEWGIZMO' and 'Description' is 'Gizmo01'. 'Unit Cost' is '10' and 'Purchase Unit' is '1'. 'Vat Code' is 'T1' and 'Rate %' is '15'. The 'Quantity' field contains '1' and the 'Discount Code' field is empty. 'Sub Total' is '10.00', 'Plus VAT' is '1.50', and 'Total' is '11.50'. At the bottom, 'Free Stock' is '86', 'Min Stock' is '1', 'Max Stock' is '10', and the 'Add' button is highlighted with a red box.

Enter Quantity

The part will then be added to the Purchase Order.

The screenshot shows the 'Order Details' screen. The 'AC No.' is 'ASCSOFTW', 'Cust Ref' is empty, 'Date' is '11/08/2009', 'Order No.' is '106291', and the company details are 'ASC Software Ltd, 58 Le Broquay Avenue, Parkwest Industrial Park, Dublin 12'. The 'Stock Depot' is 'ASC Software (Ardee)'. The table shows a single item: 'Part No' 'NEWGIZMO' with 'Qty' '1', 'Price' '10.00', 'Vat Code' 'T1', 'Net' '10.00', 'VAT' '1.50', and 'Gross' '11.50'. At the bottom, there are buttons for 'Add Product' (highlighted with a red box), 'Audit Trail', 'Total' (10.00), 'VAT' (1.50), 'Grand Total' (11.50), 'Save', and 'Close'.

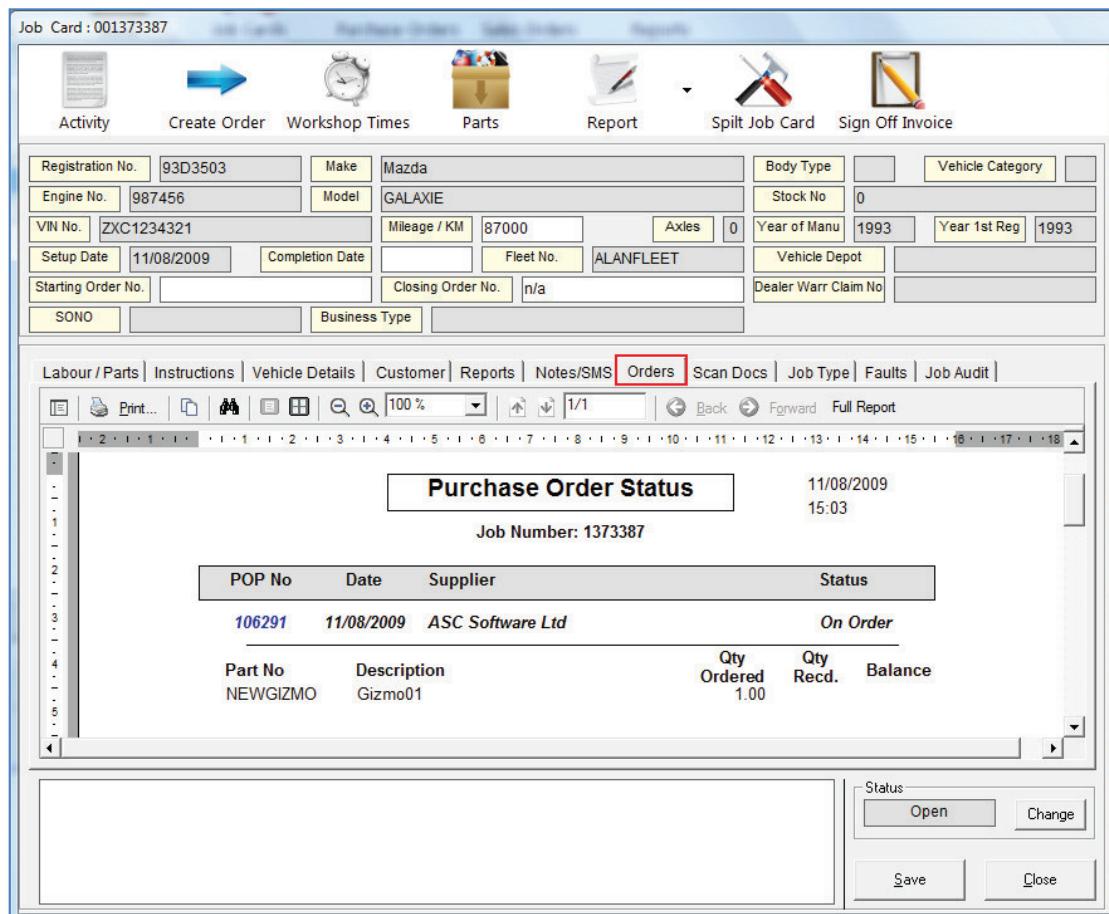
Part Added to PO

Click on **Add Product** to add another part on to the Purchase Order for this Job Card or click on **Save** to save and close the Purchase Order.

Note – the Purchase Order will remain with an open status until it is put *On Order*. For more details on this refer to the Purchase Order section.

View the Status of a Purchase Order on a Job Card

You can view the status of Purchase Orders on a Job Card by opening the Job Card and clicking on the *Orders* tab.



The screenshot shows the 'Job Card' interface for job number 001373387. The 'Orders' tab is selected. The 'Purchase Order Status' report is displayed, showing a single purchase order line:

POP No	Date	Supplier	Status
106291	11/08/2009	ASC Software Ltd	On Order

Details for the purchase order line:

Part No	Description	Qty Ordered	Qty Recd.	Balance
NEWGIZMO	Gizmo01	1.00		

Buttons for managing the status are visible on the right: Open, Change, Save, and Close.

Purchase Order Status

The *Purchase Order Status* report will be displayed containing the details and statuses of the Purchase Orders on the Job Card.

Click **Full Report** to view the report in full screen.

Clicking on the Purchase Order number (in blue) will take you directly to the Purchase Order.

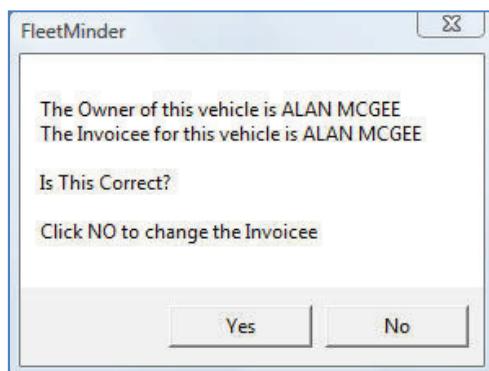
Change the Invoicee on a Job Card

To ensure all charges on the job card are billed to an invoicee that is different to the current, you should change the invoicee at the creation of the job card.

However, if you wish to charge only a few items to a different invoicee, you need to create the job card with the *default* invoicee as displayed in the *Invoice To* field and then individually change *Labour* and *Parts*. For a more comprehensive way to do this see the Job Card Split section.

Changing Invoicee at Creation of Job Card

If you are changing it from the start of a job card, click on **No** to indicate that you wish to change the invoicee.



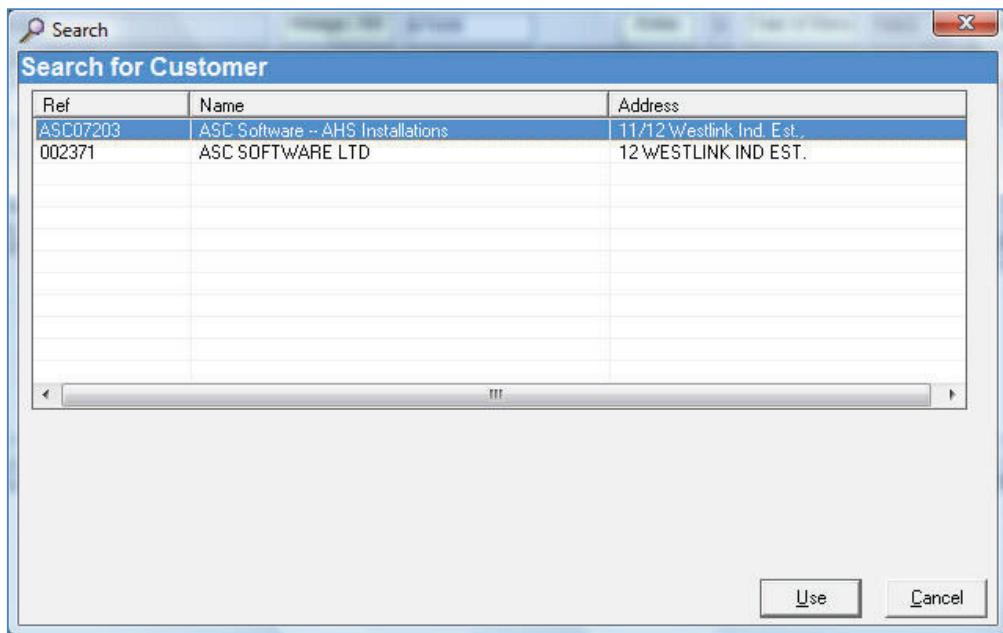
Changing Invoicee

The Select Invoicee screen will then appear.



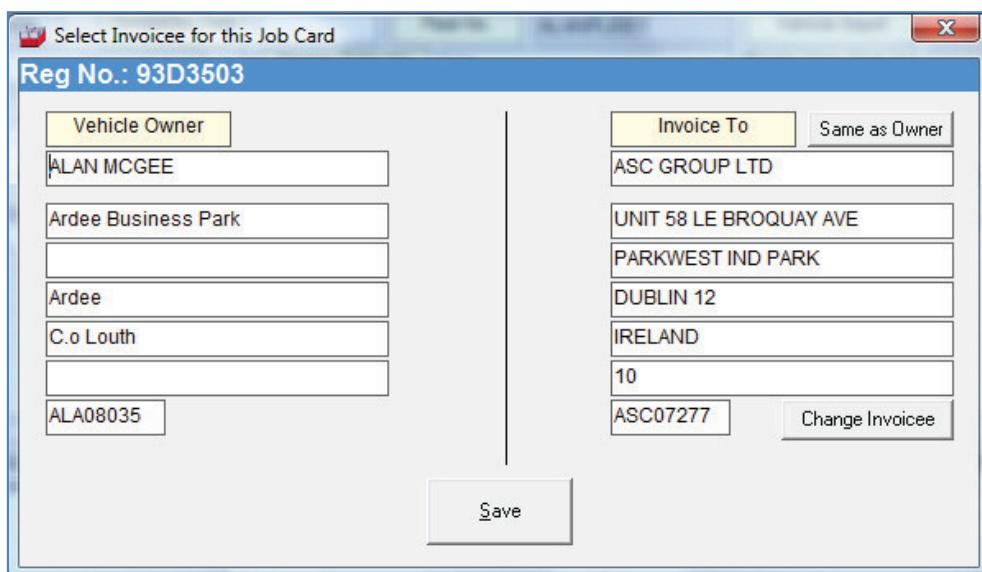
Search for New Invoicee

Type the search criteria of the preferred invoicee in the search box and press **Enter**.



Selecting the New Invoicee

Click on the Customer from the list to select them.
Then click **Use** button.



Invoicee altered

Click **Save** button.

The system will bring you back to the next stage of setting up the job card.

Changing Invoicee during Job Card Lifespan

For a more comprehensive method on changing the invoicee see the section on Split Job Card.

After the job card has been created and an invoicee set, if you want to invoice someone other than the named invoicee, you need to allocate the invoicee to each of the *Labour* costs and *Part* costs individually.

In the Job Card, we can note that the current status is: **Alan McGee** owns the vehicle and the *Invoice To* is **ASC Group Ltd**.

Labour / Parts		Instructions		Vehicle Details		Customer		Reports		Notes		Orders		Scan Docs		Job Type		Job Audit					
Vehicle Owner				Invoice To																			
ALAN MCGEE		ALA08035		ASC GROUP LTD		ASC07277		11/12 WESTLINK IND EST		KYLEMORE RD		DUBLIN		10									
Ardee Business Park		CA0001																					
Ardee																							
C.o Louth																							
Telephone				Telephone				Telephone				Telephone											
Fax				Fax				Fax				Fax											
Mobile				Mobile				Mobile				Mobile											

Vehicle Owner and Invoice To

On this job card, we currently have two lots of labour – ‘*Std Labour*’ and ‘*H/lamp Alignment*’. We also have two ‘*Wiper Blade*’ parts on the job card.

Labour / Parts		Instructions		Vehicle Details		Customer		Reports		Notes/SMS		Orders		Scan Docs		Job Type		Faults		Job Audit				
Labour Code	Description																							
1101	Std Labour																		Rate	Hours	Total	VAT Code		
1250	H/lamp Alignment																		45.00	1.00	45.00	T9		
																			50.00	0.50	25.00			
Part No		Description																		Val Price	Qty	Total Cost	Total Sale	VAT Code
NEWGIZMO		Gizmo01																		10.00	1	10.00	13.00	T9
																		Status	Open	Change				
																		Save		Close				

Labour and Parts

Currently, this labour and parts will be charged to the invoicee as is named in *Invoice To* field by default.

However, if we wanted to charge the *H/lamp Alignment* to the owner of the vehicle, *Alan McGee* instead of the default invoicee *ASC Group*, we have to change it manually.

Double click on the item on which you wish to change the invoicee – in our example we double clicked on *H/lamp Alignment*.

Job Labour : 001373387

Labour Code : 1250

Employee	Date	Start	End	Worked	Charged	Inv To	VAT	VMRS	
Alan McGee	11/08/2009	00:00	00:00	0.00	0.50	ASC Software -- AHS Insta...	T9	34007	

Change the Invoicee

Next, double-click on the line below *Inv To*, to change the invoicee.

Edit Job Labour

Labour Code : 1250

Name	Alan McGee	Rate Per Hour		
Date	11/08/2009	Add Instruction		
34007	lighting system.	50		
Headlamp Alignment				
Start Time	End Time	Worked Time	Charged Time	Charge Value
00:00	00:00	0.00	0.50	25.00

Invoice To

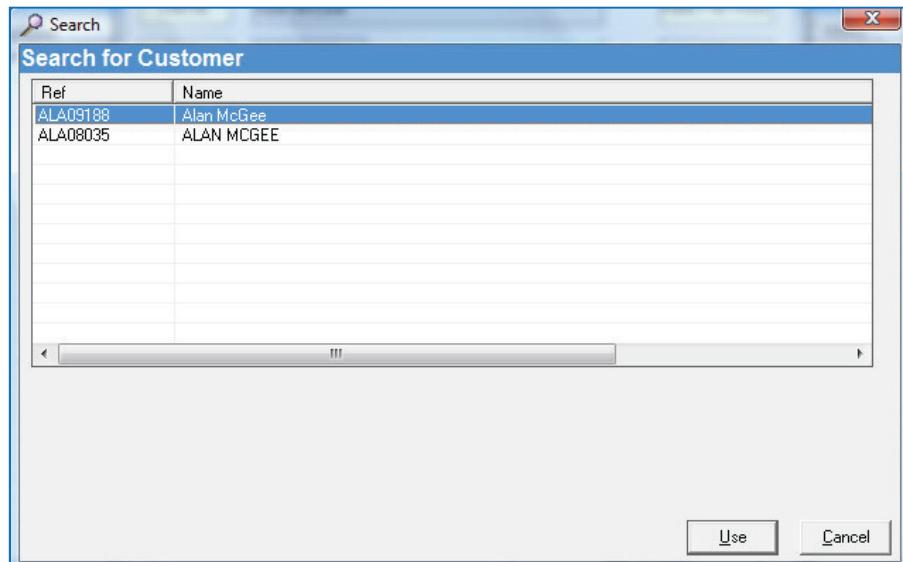
ASC Software -- AHS Installations

11/12 Westlink Ind. Est.
Kylemore Road,
Dublin 10

Enter the New Invoice Name

In the box underneath *Invoice To* type in the name of the customer you wish to make the invoice, in this case we have typed in **Alan McGee**.

You can type in all or part of the name. Press *Enter* when you have typed it and this will prompt a search.



Customer Search Results

Select the customer from the list by left clicking on it once.
Then click on **Use** button.

The dialog box is titled 'Edit Job Labour' and 'Labour Code : 1250'. It contains several input fields: 'Name' (Alan McGee), 'Date' (11/08/2009), 'Rate Per Hour' (50), 'Description' (34007, lighting system.), 'Headlamp Alignment', 'Start Time' (00:00), 'End Time' (00:00), 'Worked Time' (0.00), 'Charged Time' (0.50), and 'Charge Value' (25.00). In the 'Invoice To' section, 'Set to Same as Vehicle Owner' is checked. A list of names is shown: ALAN MCGEE, Ardee Business Park, Ardee, C.o Louth. At the bottom are 'Save' and 'Close' buttons.

New Invoicee

The new invoicee will be on display. Click on **Save**.

Job Labour : 001373387

Labour Code : 1250

Employee	Date	Start	End	Worked	Charged	Inv To	VAT	VMRS
Alan McGee	11/08/2009	00:00	00:00	0.00	0.50	ALAN MCGEE	T21	34007

Global VAT Code Adjustment

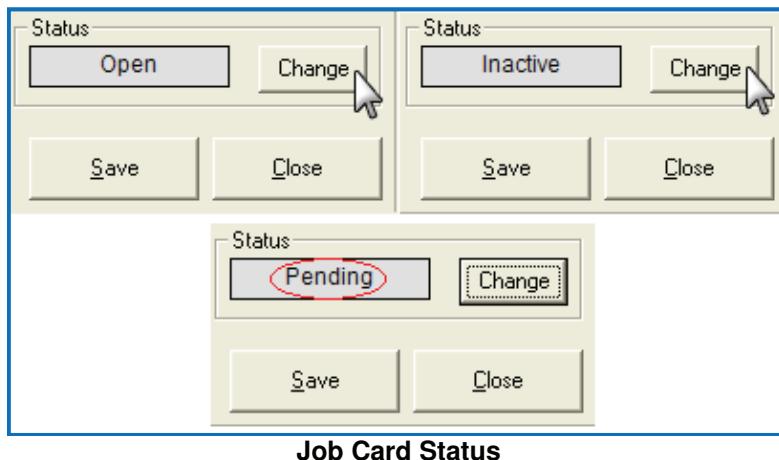
New Invoicee

Then click on **Close**.

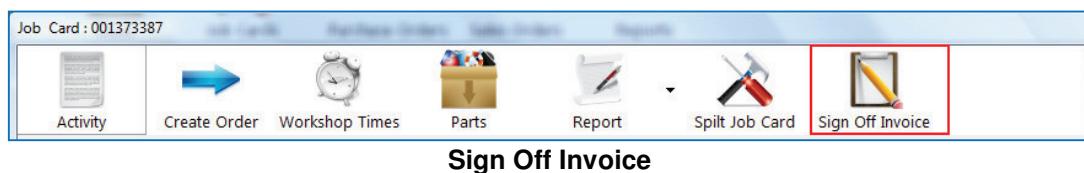
When the Job Card is signed off, a new job card will be created displaying the parts and labour that is to be invoiced to each invoicee, allowing separate invoices to be generated. In this example, one invoice is generated for *Alan McGee* and one for *ASC Software* from two job cards.

Sign Off a Job Card

To sign off a Job Card, the status must be changed to Pending.

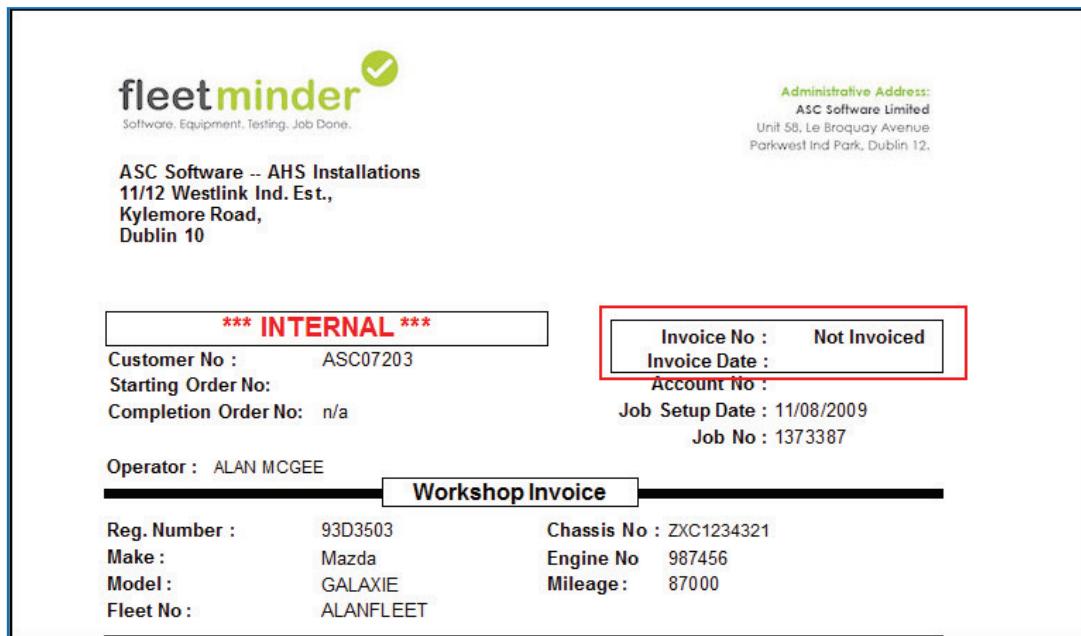


Click on **Sign Off Invoice**.



FleetMinder will then produce a Pro Forma invoice so that you can verify that the details are correct.

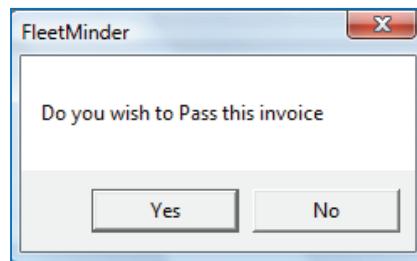
Note – the Invoice Number and Date are not displayed yet.



Pro Forma Invoice – No Invoice Number

Click on the in the top-right corner to close the visible invoice.

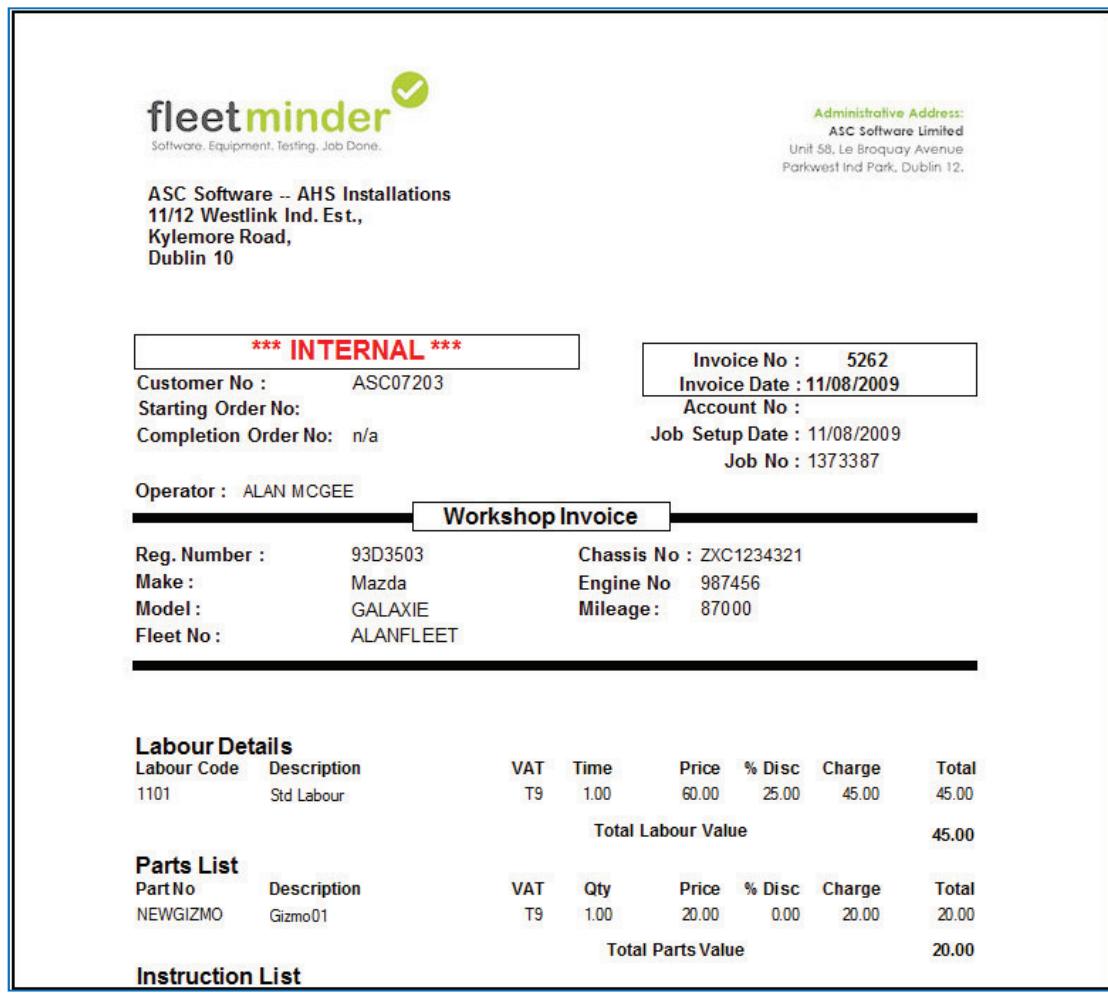
You will then be prompted to pass (sign off) the invoice.



Pass the Invoice

Click **Yes** to sign off the invoice or click **No** to return to the Job Card without signing off.

If you have passed the invoice then FleetMinder will display the Invoice.



fleetminder Software. Equipment. Testing. Job Done.

ASC Software -- AHS Installations
11/12 Westlink Ind. Est.,
Kylemore Road,
Dublin 10

Administrative Address:
ASC Software Limited
Unit 58, Le Broquay Avenue
Parkwest Ind Park, Dublin 12.

***** INTERNAL *****

Customer No :	ASC07203	Invoice No :	5262
Starting Order No:		Invoice Date :	11/08/2009
Completion Order No:	n/a	Account No :	
Operator :	ALAN MCGEE	Job Setup Date :	11/08/2009
		Job No :	1373387

Workshop Invoice

Reg. Number :	93D3503	Chassis No :	ZXC1234321
Make :	Mazda	Engine No	987456
Model :	GALAXIE	Mileage:	87000
Fleet No :	ALANFLEET		

Labour Details

Labour Code	Description	VAT	Time	Price	% Disc	Charge	Total
1101	Std Labour	T9	1.00	60.00	25.00	45.00	45.00
Total Labour Value							45.00

Parts List

PartNo	Description	VAT	Qty	Price	% Disc	Charge	Total
NEWGIZMO	Gizmo01	T9	1.00	20.00	0.00	20.00	20.00
Total Parts Value							20.00

Instruction List

Invoice

Note that the Invoice Number and Date have now been added to the Invoice.

Click **Print** to print out the Invoice.

Alternatively, you can click **Email** or **Fax** to email or fax the invoice to the customer.

Click on the  in the top-right corner to close the invoice.

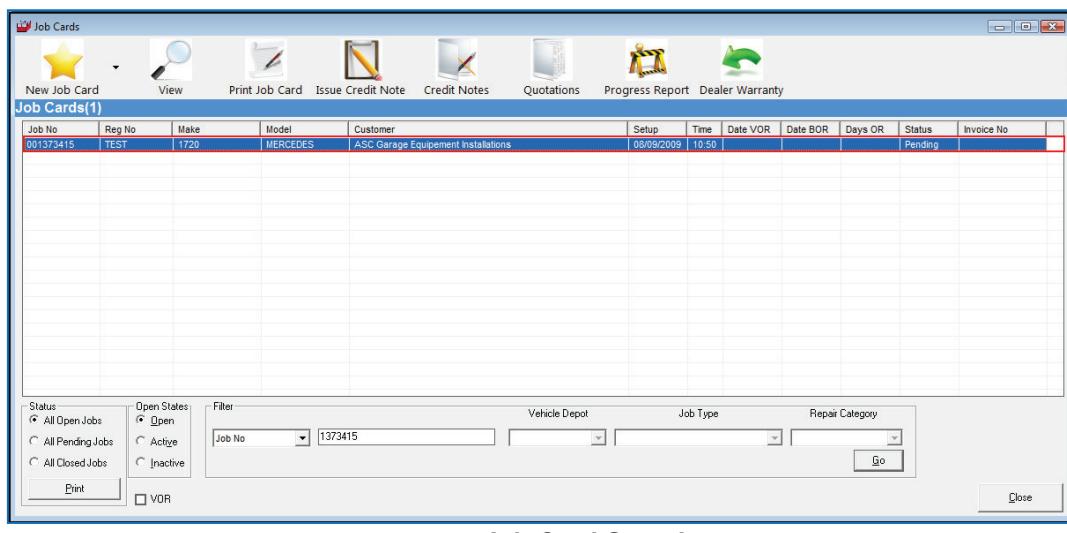
Note – the status of this Job Card will now have changed to Closed. To view this Job Card, click on **All Closed Jobs**. To view the invoice again, click on **Sign Off Invoice**.

Split Job Card

To split a job card to a new invoicee click on the **Job Cards** Section.

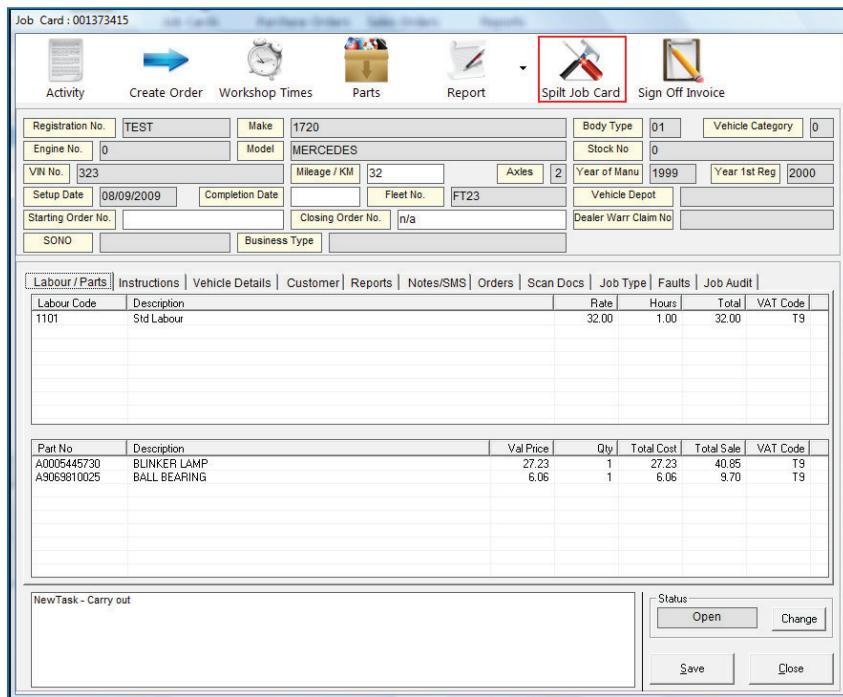


You then need to search for the job card that you want to split.



Job Card Search

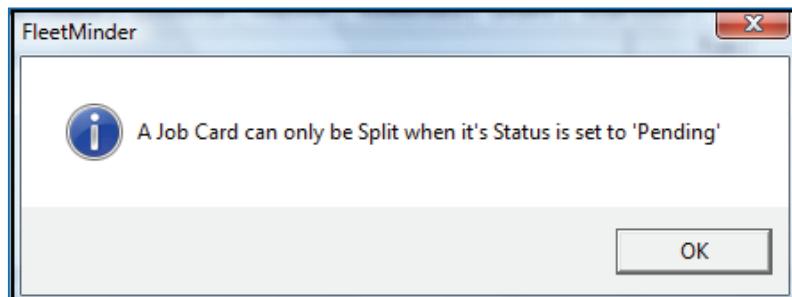
Once you have found the job, **Double Click** it and to open up the job card. You will then see the “**Split Job Card**” button at the top of the job card.



Split Job Card

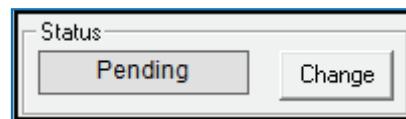
Click on **Split Job Card**.

You may receive the following message:



Job Card 'Pending' Message

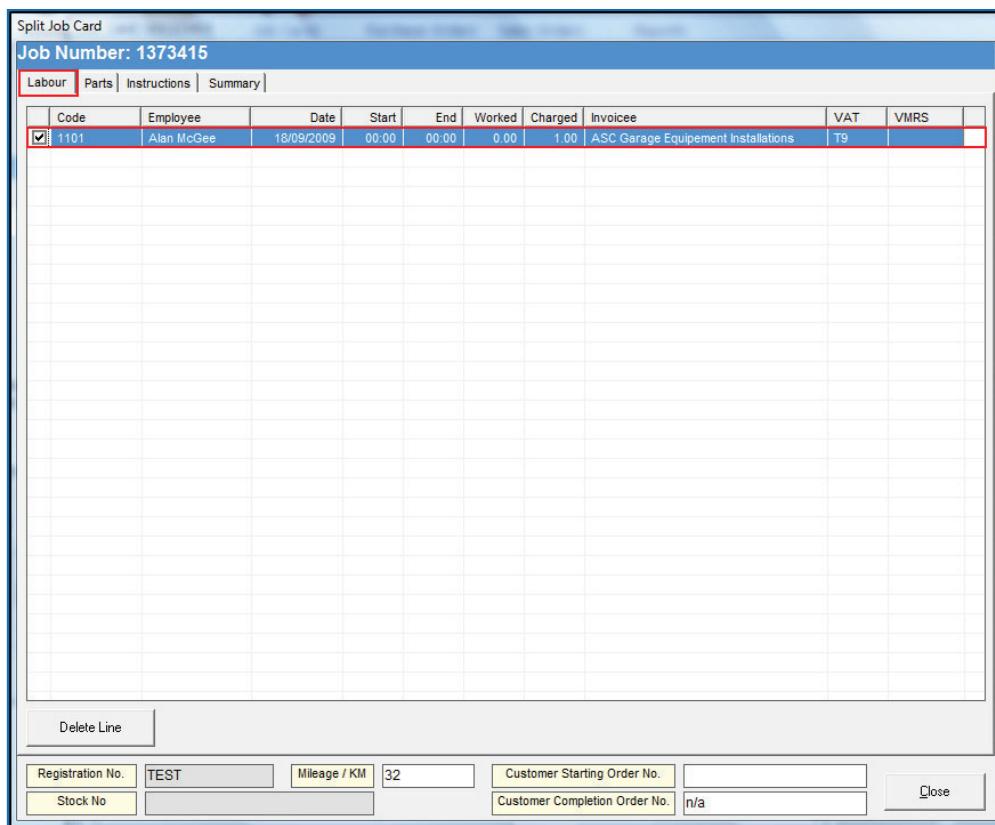
To set the status to pending click on **Change**. This will change the status from **Open** to **Pending**.



Pending Status

You can now click on the **Split job card** Button.

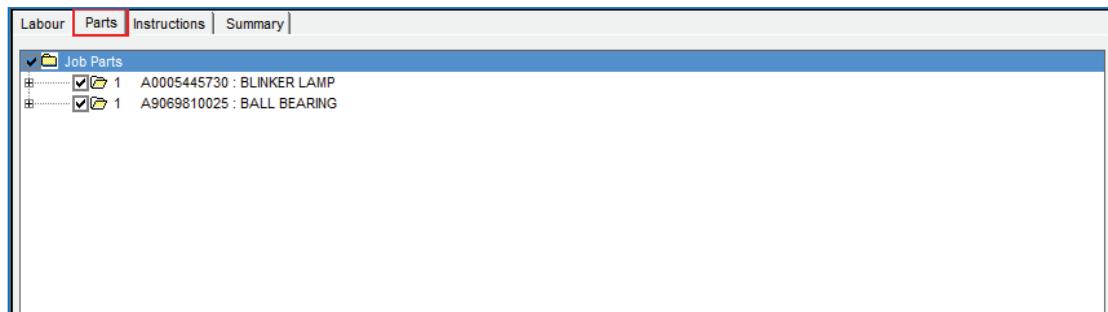
The following screen window will be displayed.



Job Card Split Labour

In the following sections you can split off **Labour**, **Parts** and **Instructions**.

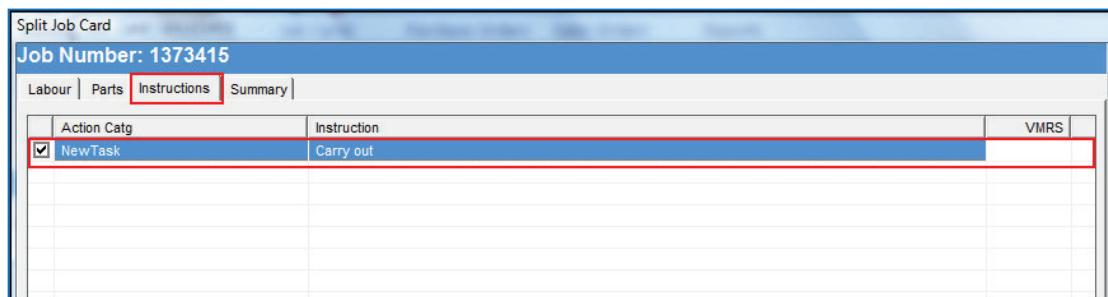
In each section there is a tick box beside each labour line, part and instruction. To include these in the Split job card you need to tick the check box that corresponds to the **labour/ part /instruction** you want split off.



Job Card Part Split Parts

To Split off parts you need to click on the **Parts** Tab.

And as above you need to check each box that you want to split off from the jobcard.



Job Card Split Instructions

You can also split of Job Instructions, if you click on the instructions tab you then can check the box that corresponds to the instruction(s) that you want to split off.

Job Card Split Summary

In the summary section you will see Labour, Parts and Instructions sections you have split from the job card.

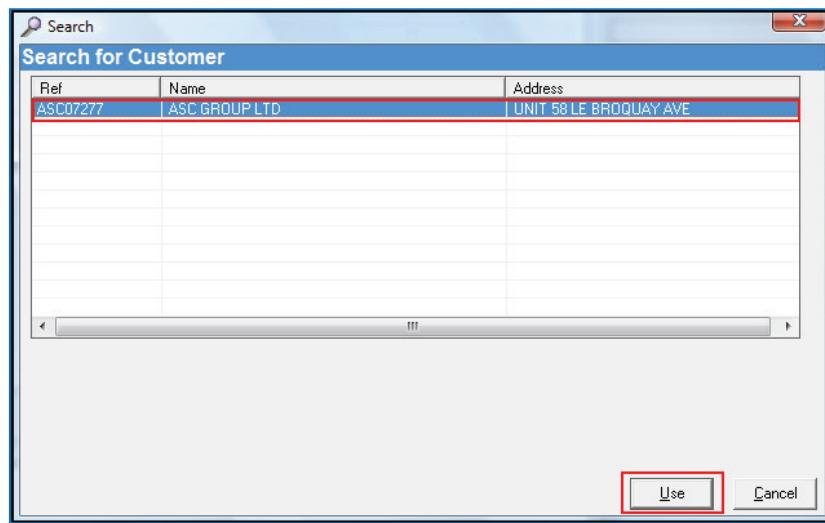
You can make an amendment by clicking on the relevant tab at the top of the screen.

On the summary screen you will also see the 'Invoice To' section.

You can select your invoicee.

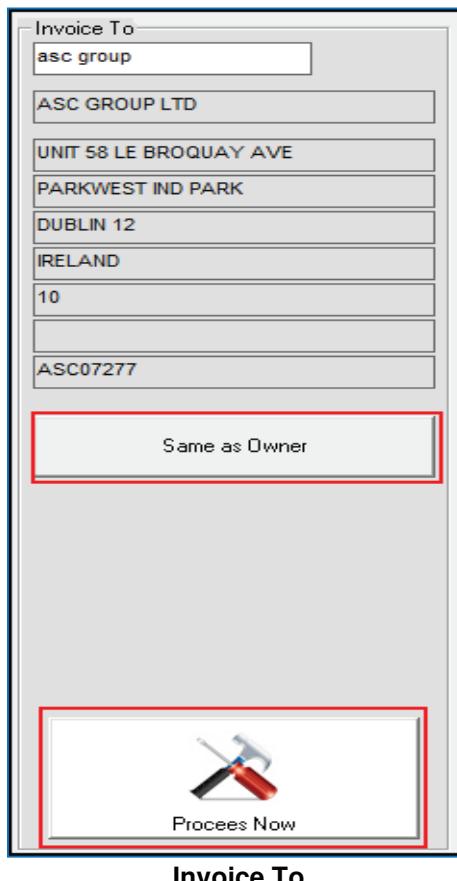
Click on the 'Invoice To' section

Type in the customer name and then press **Enter**.



Customer Search

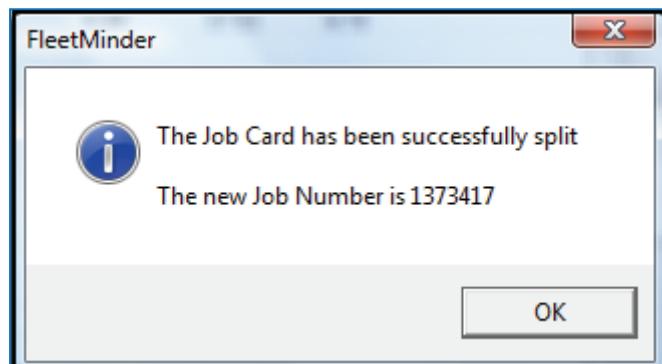
To select the customer click on the customer line to highlight it and click **Use**.



Invoice To

This will now add the selected customer as the invoice for the split job card. You can also add the invoicee as the current owner of the vehicle by Clicking **Same as Owner** button.

To complete the splitting of the job Click on **Process Now**

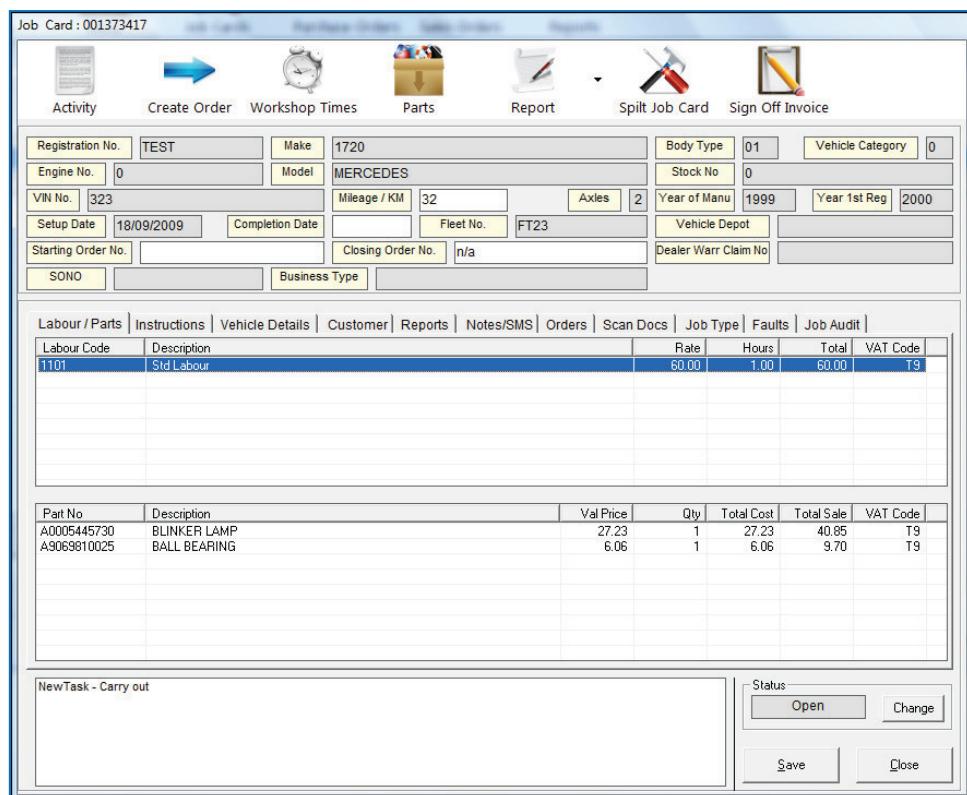


Job Card Split New job Number

You will then receive the above message which includes the new job number.



To open this new job you can go to the **Job Card** Section in the main menu and search for the new job number, in this case it is Job No: 1373417.



New job Card

The New job card will now show all the labour, parts and instructions that have been split off.

Labour / Parts | Instructions | Vehicle Details | **Customer** | Reports | Notes/SMS | Orders | Scan Docs | Job Type | Faults | Job Audit |

Vehicle Owner ASC Garage Equipment Installations ASC07788 58 Le Broquay Av., CA0001 Parkwest Ind Park Dublin 12 Telephone 6120922 Fax Mobile 353 2323	Invoicee Credit Info ASC GROUP LTD ASC07277 UNIT 58 LE BROQUAY AVE CA0001 PARKWEST IND PARK DUBLIN 12 IRELAND 10 Telephone 01 6120922 Fax Mobile 087 6693090
NewTask - Carry out	
Status <input type="button" value="Open"/> <input type="button" value="Change"/> <input type="button" value="Save"/> <input type="button" value="Close"/>	

To view the new invoicee click the '**Customer**' Tab.

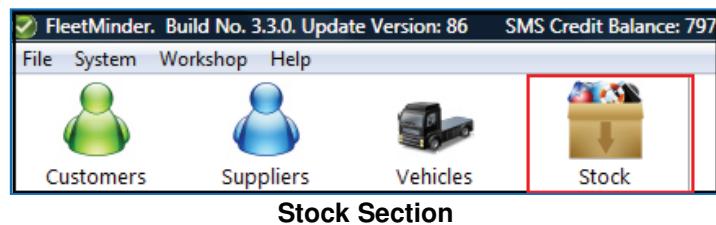
In this example you can see it has changed from ASC Garage to ASC Group.

The original job card will still be on the system, minus the parts / labour that were split off.

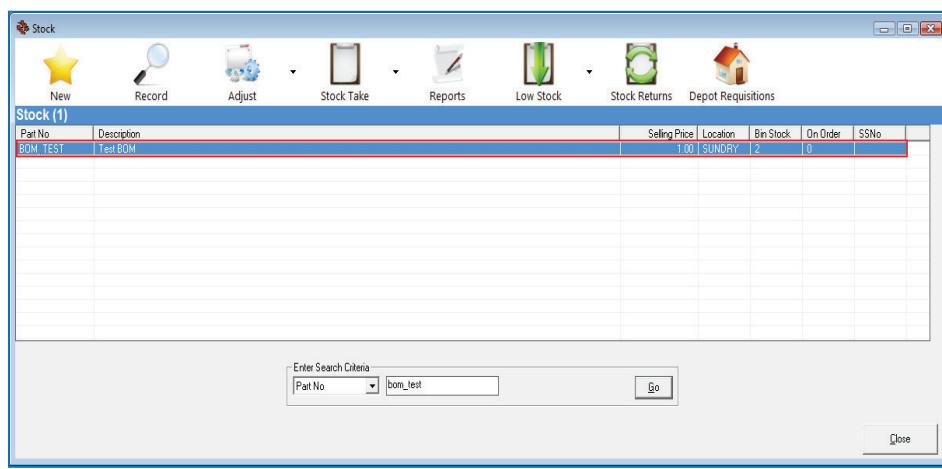
New Bill of Materials Job card

To create A Bill of Materials job card you will first have to assign a Stock Item as the Super Build of Materials Part.

To create the super BOM part you will need to click on the stock section on the main option bar. Then select the stock item that you want to assign as the super BOM part or alternatively create a brand new Stock item and set this as the super Bom part.



In the example below we have selected part no: Bom_Test
You will then need to double click on the stock item to open up the Stock record.



Stock Search

Within the stock record you will see a Super Bom Part checkbox. To set this as the super Bom Part you will need to check this box.

You will then see a new Tab at the top called "Bill of Materials"

This is the section where you can add in your parts needed in order to manufacture the Bom Part.

Stock Record

Click on the '**Bill of Materials**' tab.

To add a part to your BOM click on “Add part”.

You can then search for the part by either Part no or Description

Bill of Materials Add Part

Once you have selected your part, you will need to put in the quantity required in this case we will put in 2.

Bill of Materials - Add Part

Parts for BOM Part No :

Part No	A	BOM_TEST
Description	Part A	
Bin Stock	0	
Location	DIRECT PART	
Qty Required	<input type="text"/>	

Add Quantity

Click **Save** to Add Part.

You can also add an alternative part. This part will be used if the main part is out of stock. To add the alternative part click **Edit Alt Part**.

Stock Record

BOM_TEST - Test BOM

Bill of Materials						
Part No	Description	Qty	Alt Part No	Description	Seq	
A	Part A	2	D	Part D	1	
B	Part B	2	C	Part C	2	
C	Part C	2	A	Part A	3	
D	Part D	2			4	

Edit Alt Part

Add Part

Edit Alt Part

Change Sequence

Save

Close

You will then get a section where you can search by Part no or Description.

Bill of Materials - Edit Alternative Part

Parts for BOM Part No :

Part No	AL001	AL001	Current Part
Description	Alan Test	AL001	Alan Test
Bin Stock	0		
Location	4911		

Save **Close**

Edit Alternative Part

Click **Save** to add alt part.

Stock Record

BOM_TEST - Test BOM

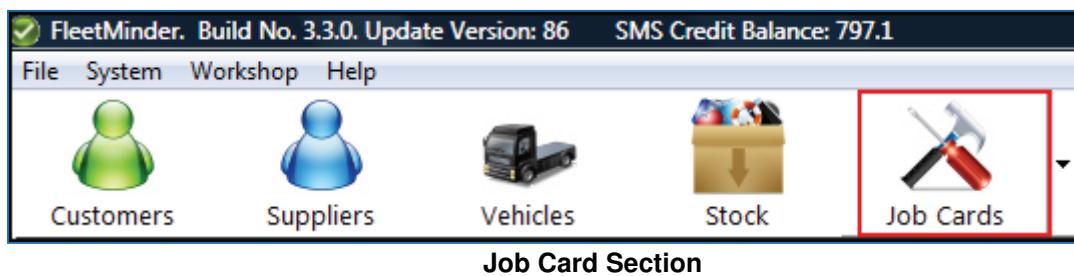
Bill of Materials					
Part No	Description	Qty	Alt Part No	Description	Seq
A	Part A	2	D	Part D	1
B	Part B	2	C	Part C	2
C	Part C	2	A	Part A	3
D	Part D	2	AL001	Alan Test	4

Add Part **Edit Part** **Edit Alt Part** **Delete Part** **Delete Alt** **Change Sequence** **Save** **Close**

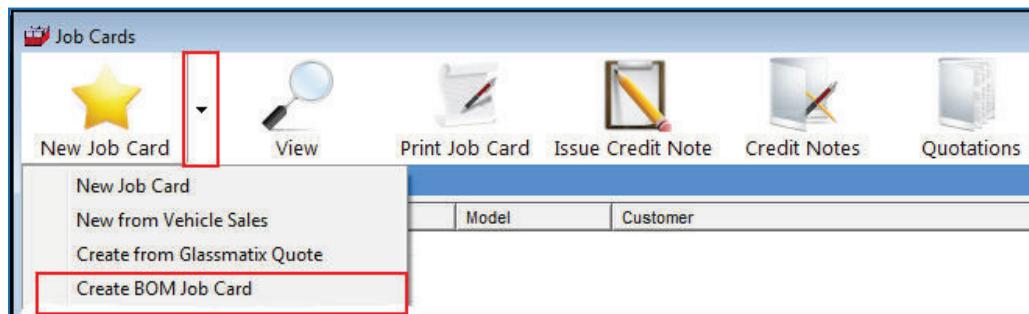
Alternative Part Added

When you have completed setting up your BOM Part you can now setup the BOM job to build the Super BOM Part.

Click on **Job Cards**.



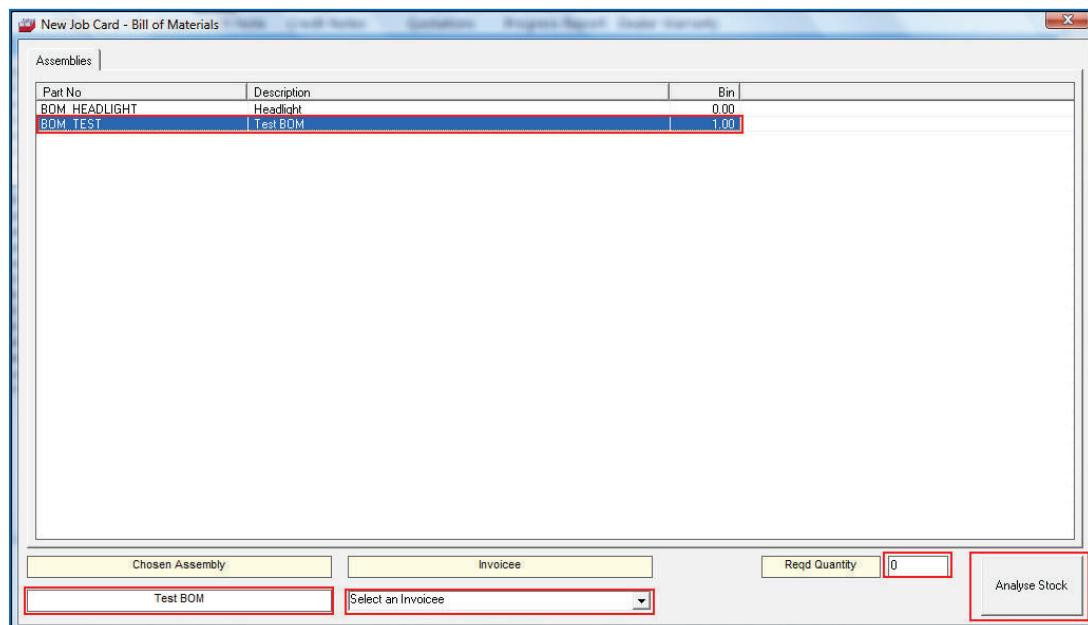
Click the drop down button beside '**New job Card**'.
You will then see "**Create BOM job Card**".



New Job Card Drop Down

Once clicked you will see the bill of materials assemblies screen. This will contain all BOM assemblies on the system.

You should see the BOM we set up "BOM_TEST". Click on "**BOM_TEST**". This assembly and use the invoicee drop down box to select your invoicee, in this example we have used "**ASC Group LTD**".



BOM

Chosen Assembly	Invoicee	Reqd Quantity	2	Analyse Stock
Test BOM	ASC GROUP LTD			
ASC GROUP LTD ASC REMANUFACTURING ASC SALE VEHICLES ASC Software - AHS Installations ASC SOFTWARE LTD ASC WORKSHOP SUNDRIES AUTOMOTIVE SERVICES GE ASSEMBLY				

BOM Job Setup

Once you have chosen the assembly and have selected the invoicee you will have to enter the **Required Quantity**, in this example we have entered 2.

Chosen Assembly	Invoicee	Reqd Quantity	2	Analyse Stock
TESTBOM	ASC GROUP LTD			

Required Quantity

Click on “**Analyse Stock**”

This will check the bin stock figures for you assembly and will show you your maximum production quantity from you current bin stock values.

New Job Card - Bill of Materials										
Assemblies		Stock Breakdown								
Unit Qty	Req Qty	Part No	Description	Bin	Alt Part No	Alt Description	Alt Bin	Tot Bin	Short	
1	2	A	Part A	1	D	Part D	1	2.00	-1	
1	2	B	Part B	1	C	Part C	1	2.00	-1	
1	2	C	Part C	1	A	Part A	1	2.00	-1	
1	2	D	Part D	1	AL001	Alan Test	0	1.00	-1	

Max Production Qty: 1.00 Create Job

Chosen Assembly	Invoicee	Reqd Quantity	2.00	Analyse Stock
Test BOM	ASC GROUP LTD			

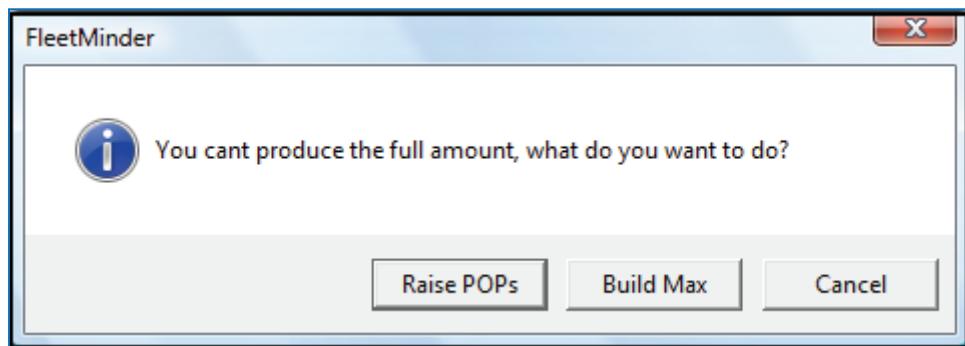
Bin Stock

In the below example the current bin stock for the parts is 1. Therefore it displays the maximum production quantity is 1.

With our example we said the required quantity was 2,

Click Create Job. **Create Job**

You will see the following window:



Insufficient Stock

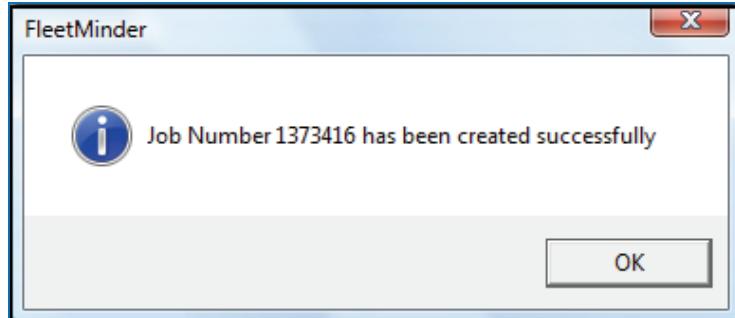
Raise POPs – This will raise purchase orders for the remaining parts allowing you to build the required quantity.

In this example it will raise a purchase order for parts a,b,c,d, ordering 1 for each.

Build Max – This will build your maximum production quantity that current bin stock levels will allow.

In this example it will build Max BOM of 1.

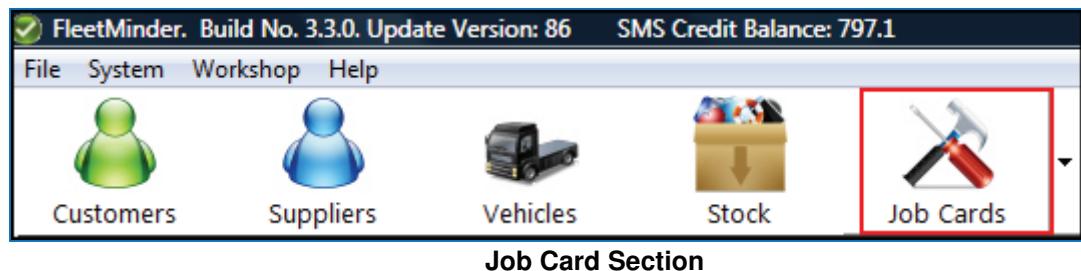
Click on build max and you will receive the following message.



Fleetminder Job Created

This has created job No: 1373416

To open this job you will need to go to the Job Cards section.



Double Click on the new job.

Job Card : 001373416

Activity Create Order Workshop Times Parts Report Split Job Card Sign Off Invoice

Registration No.	BOM_TEST	Make	WS-BOM	Body Type		Vehicle Category	
Engine No.		Model	Test BOM	Stock No.	0		
VIN No.	BOM_TEST	Mileage / KM	0	Axles	0		
Setup Date	18/09/2009	Completion Date		Fleet No.			
Starting Order No.		Closing Order No.	n/a	Vehicle Depot			
SONO		Business Type		Dealer Warr Claim No.			

Labour / Parts | Instructions | Vehicle Details | Customer | Reports | Notes/SMS | Orders | Scan Docs | Job Type | Faults | Job Audit |

Labour Code	Description	Rate	Hours	Total	VAT Code

Part No	Description	Val Price	Qty	Total Cost	Total Sale	VAT Code
A	Part A	1.00	1	1.00	1.00	T9
B	Part B	1.00	1	1.00	1.00	T9
C	Part C	1.00	1	1.00	1.00	T9
D	Part D	1.00	1	1.00	1.00	T9

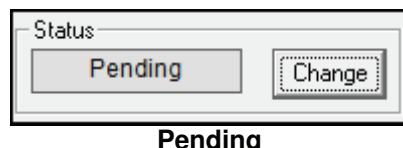
Free Text - Manufacture 1 of BOM_TEST : Test BOM

Status Open Change

Save Close

BOM Job Card

You can then add labour (or more parts) to the job. Once it has been completed click **Change** to change the status to Pending.

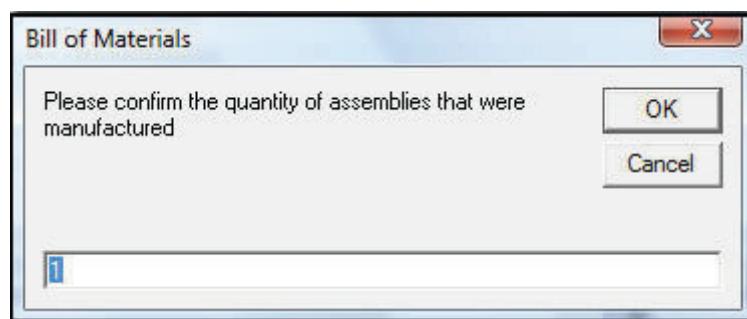


Pending

Click **Sign off Invoice**



Sign off as you would with a standard job card, before you complete the sign off process you will see the following window.



This window appears to confirm the quantity of assemblies manufactured.

fleetminder Software. Equipment. Testing. Job Done.		Administrative Address: ASC Software Limited Unit 58, Le Broquay Avenue Parkwest Ind Park, Dublin 12.					
ASC GROUP LTD UNIT 58 LE BROQUAY AVE PARKWEST IND PARK DUBLIN 12 IRELAND 10							
*** INTERNAL ***		Invoice No : 5263 Invoice Date : 31/08/2009					
Customer No : ASC07277 Starting Order No: Completion Order No: n/a		Account No : CA0001 Job Setup Date : 31/08/2009 Job No : 1373404					
Operator : ASC GROUP LTD		Workshop Invoice					
Reg. Number :	BOM_TEST	Chassis No :	BOM_TEST				
Make :	WS-BOM	Engine No					
Model :	Test BOM	Mileage:	0				
Fleet No:							
Labour Details							
VRMS Code	Description	VAT	Time	Price	% Disc	Charge	Total
Total Labour Value							
Parts List							
Part No	Description	VAT	Qty	Price	% Disc	Charge	Total
A	Part A	T9	1.00	1.00	0.00	1.00	1.00
B	Part B	T9	1.00	1.00	0.00	1.00	1.00
C	Part C	T9	1.00	1.00	0.00	1.00	1.00
D	Part D	T9	1.00	1.00	0.00	1.00	1.00
Total Parts Value							4.00
Instruction List							
Free Text							
Manufacture 1 of BOM_TEST : Test BOM							

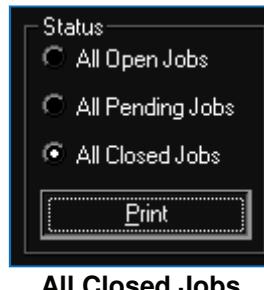
Fleetminder BOM Invoice

Once completed you will see the invoice.

BOM_Test bin stock will now increase by 1 in FleetMinder.

Issue Credit on Parts or Labour on a Job Card

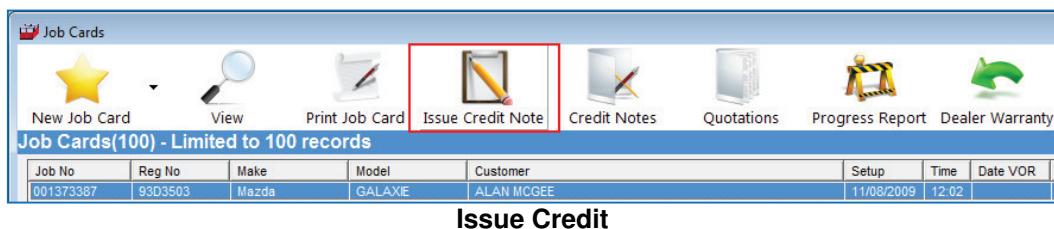
You can only issue credit on *Closed Job Cards*.



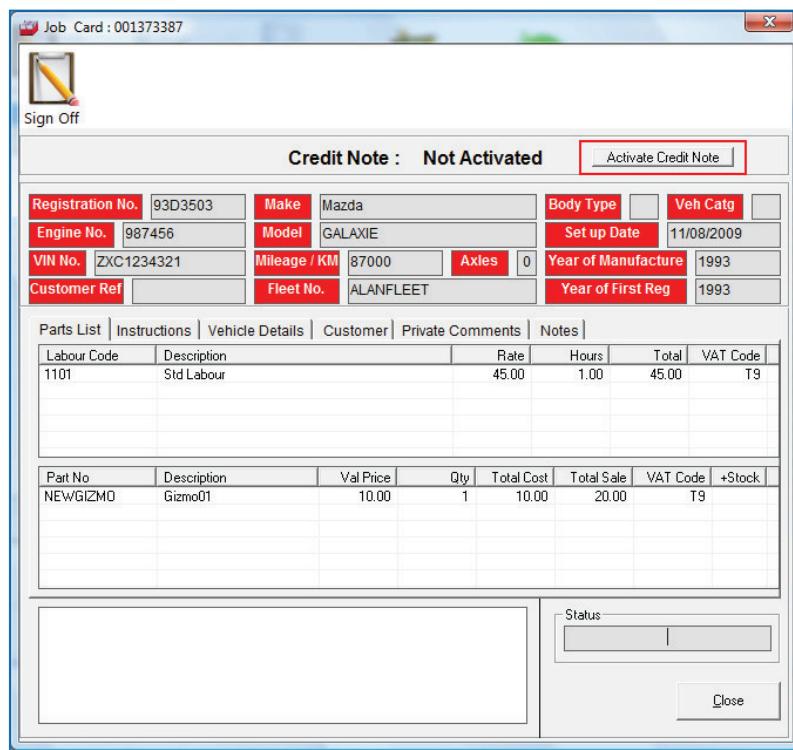
Select the *All Closed Jobs* option button.

This will display all the closed jobs within your system.

Select the job that you wish to issue credit to and then click on the **Issue Credit** button.

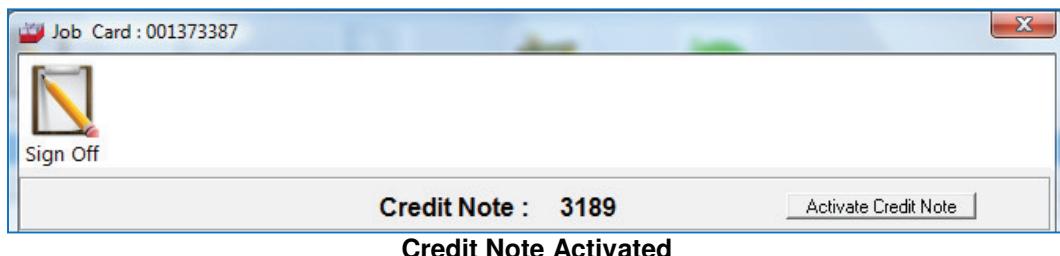


The un-activated Credit Note will then appear.



Credit Note

Click **Activate Credit Note** button when you are sure that this is the correct Job Card to which you want to issue credit.



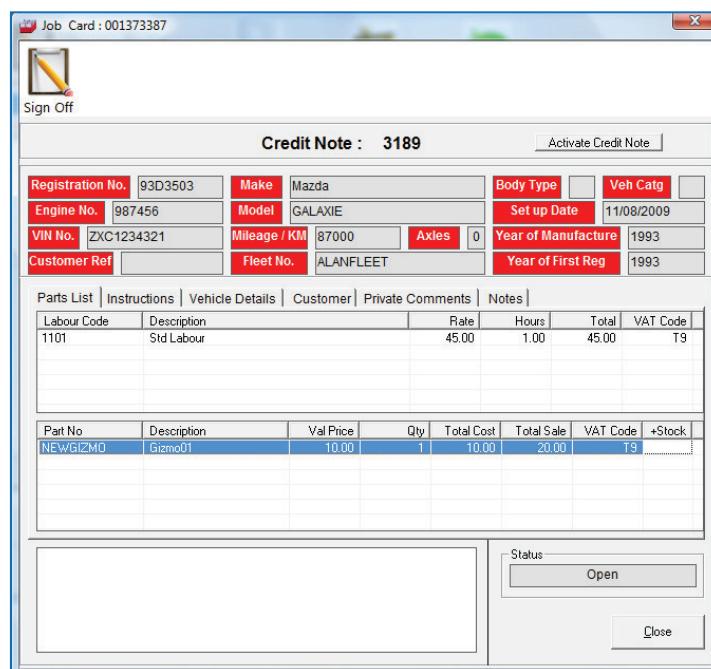
Once this is clicked, the note is activated and the *Credit Note* number is displayed. In this example, the *Credit Note number* is 3164.

You can credit the whole Job Card, or you can go into each item and adjust them manually.

All the items on display are the items, quantities and prices that were issued on the original invoice.

In this example, we only want to give credit on:

NewGizmo Qty – 1 Total Sale – 20.00.



Selecting Part for Credit

So we first of all, double click on the selected item (Part or Labour) for which you wish to provide a credit note. This will open a credit note section, which allows you to enter the value for which you want to give credit, that is, the amount by which you want to reduce the original invoice.

Edit Credit Note Parts

Credit Note : 003189

Part No.	NEWGIZMO	
Description	Gizmo01	
VAT Code	T9	0.00
Sale Price	20.00	
Qty	1.00	
Total	20.00	

Please note.
Enter the value that you want to give credit for; that is, the amount by which you want to reduce the invoice

Add to Stock Save Cancel

Credit Amount

In this example, the *Sales Price* was **20.00** and the *QTY* was **1**.

As we want to completely credit this amount, we leave both values (reducing the previous invoice value by that amount.)

If you had 4 NEWGIZMO's on the invoice and wanted to give credit for 1, then the credit note would be issued for a *QTY* of **1**; which fundamentally means that the customer was invoiced for only 3 NEWGIZMO's.

If you are crediting a part and want to add it back into stock, tick the **Add to Stock** button and this will bring the quantity of that part in stock back up by the appropriate amount.

Then click **Save**.

Part No	Description	Val Price	Qty	Total Cost	Total Sale	VAT Code	+Stock
NEWGIZMO	Gizmo01	10.00	1	10.00	20.00	T9	Yes

Add to Stock

As you have added the part or labour into the credit note, you will see the appropriate adjustment on the credit note.

In this case, the part, *NEWGIZMO*, has been credited back into stock, which can be seen under the *+Stock* header, where it has the value **Yes**, denoting the return of the part into stock.

To Ensure Credit is Not Issued

In this example, we do not want to credit the customer anymore items. Double click on *NEWGIZMO* and in the *Edit Credit Note Parts* section, change the *Sale Price* and *QTY* to *0.00* and *0*. This will result in *0.00* of credit being given on that item – i.e. NO credit and the customer will be charged for this item.

The image displays two side-by-side screenshots of a software application window titled 'Edit Credit Note Parts'. The window shows a credit note for 'Credit Note : 003189'.

Left Screenshot (Initial State):

- Part No.: NEWGIZMO
- Description: Gizmo01
- VAT Code: T9 0.00
- Sale Price: 20.00
- Qty: 1.00
- Total: 20.00

A note box contains the text: "Please note. Enter the value that you want to give credit for; that is, the amount by which you want to reduce the invoice".

Right Screenshot (Modified State):

- Part No.: NEWGIZMO
- Description: Gizmo01
- VAT Code: T9 0.00
- Sale Price: 0.00
- Qty: 0.00
- Total: 0.00

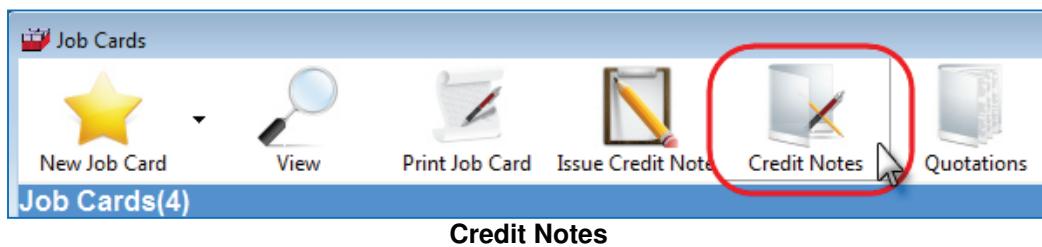
A note box contains the text: "Please note. Enter the value that you want to give credit for; that is, the amount by which you want to reduce the invoice".

Buttons at the bottom: Add to Stock (checkbox), Save, Cancel.

Item Not Credited

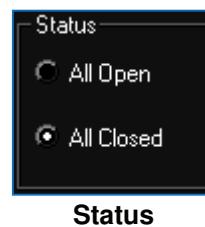
View Credit Notes

Within the *Job Cards* section, click on **Credit Notes** button.



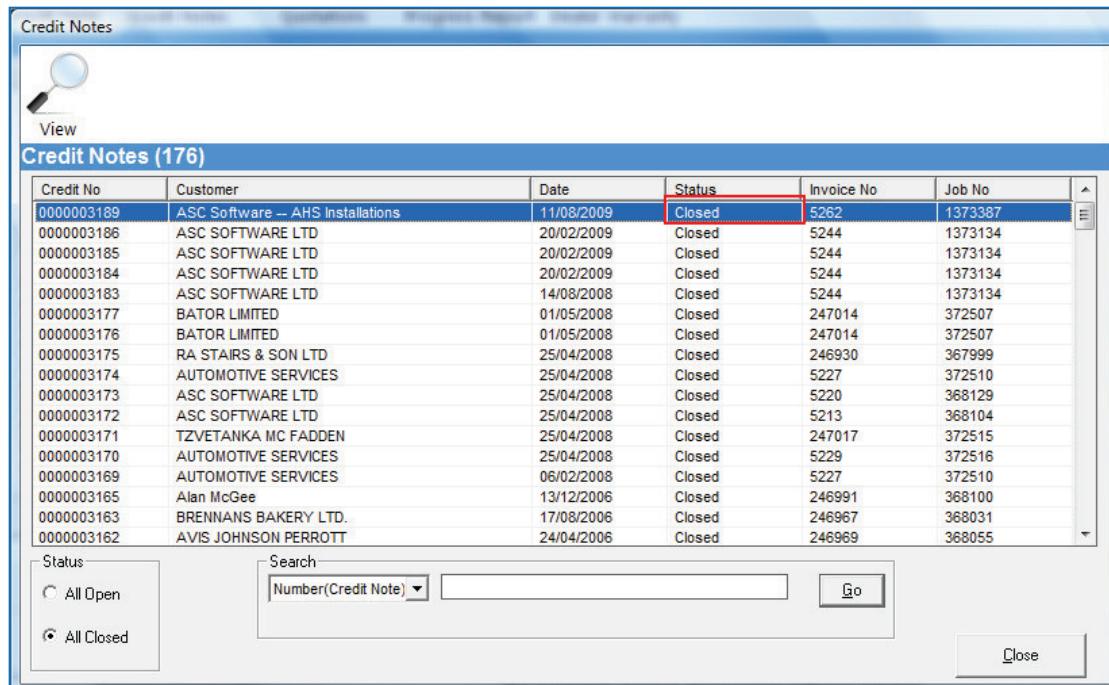
By default, all the closed credit notes appear first.

If you are looking at the open credit notes then click once on the **Status: All Closed** option. All the Credit Notes will refresh automatically, displaying only the closed ones.



Status

To open one of the credit notes either **Double Click** on it or else left click once on the credit note you want to open and click **View** button.



The screenshot shows the 'Credit Notes' list interface. At the top, there is a toolbar with a magnifying glass icon and a 'View' button. Below the toolbar, the title 'Credit Notes (176)' is displayed. The main area is a table with columns: Credit No, Customer, Date, Status, Invoice No, and Job No. The 'Status' column is highlighted with a red box. The table lists 176 entries, with the first few rows shown below:

Credit No	Customer	Date	Status	Invoice No	Job No
0000003189	ASC Software -- AHS Installations	11/08/2009	Closed	5262	1373387
0000003186	ASC SOFTWARE LTD	20/02/2009	Closed	5244	1373134
0000003185	ASC SOFTWARE LTD	20/02/2009	Closed	5244	1373134
0000003184	ASC SOFTWARE LTD	20/02/2009	Closed	5244	1373134
0000003183	ASC SOFTWARE LTD	14/08/2008	Closed	5244	1373134
0000003177	BATOR LIMITED	01/05/2008	Closed	247014	372507
0000003176	BATOR LIMITED	01/05/2008	Closed	247014	372507
0000003175	RA STAIRS & SON LTD	25/04/2008	Closed	246930	367999
0000003174	AUTOMOTIVE SERVICES	25/04/2008	Closed	5227	372510
0000003173	ASC SOFTWARE LTD	25/04/2008	Closed	5220	368129
0000003172	ASC SOFTWARE LTD	25/04/2008	Closed	5213	368104
0000003171	TZVETANKA MC FADDEN	25/04/2008	Closed	247017	372515
0000003170	AUTOMOTIVE SERVICES	25/04/2008	Closed	5229	372516
0000003169	AUTOMOTIVE SERVICES	06/02/2008	Closed	5227	372510
0000003165	Alan McGee	13/12/2006	Closed	246991	368100
0000003163	BRENNANS BAKERY LTD.	17/08/2006	Closed	246967	368031
0000003162	AVIS JOHNSON PERROTT	24/04/2006	Closed	246969	368055

At the bottom left, there is a 'Status' section with radio buttons for 'All Open' and 'All Closed'. At the bottom right, there is a 'Search' section with a dropdown menu 'Number(Credit Note)' and a 'Go' button. A 'Close' button is also present.

Closed Credit Notes

Print out a Workshop Credit Note

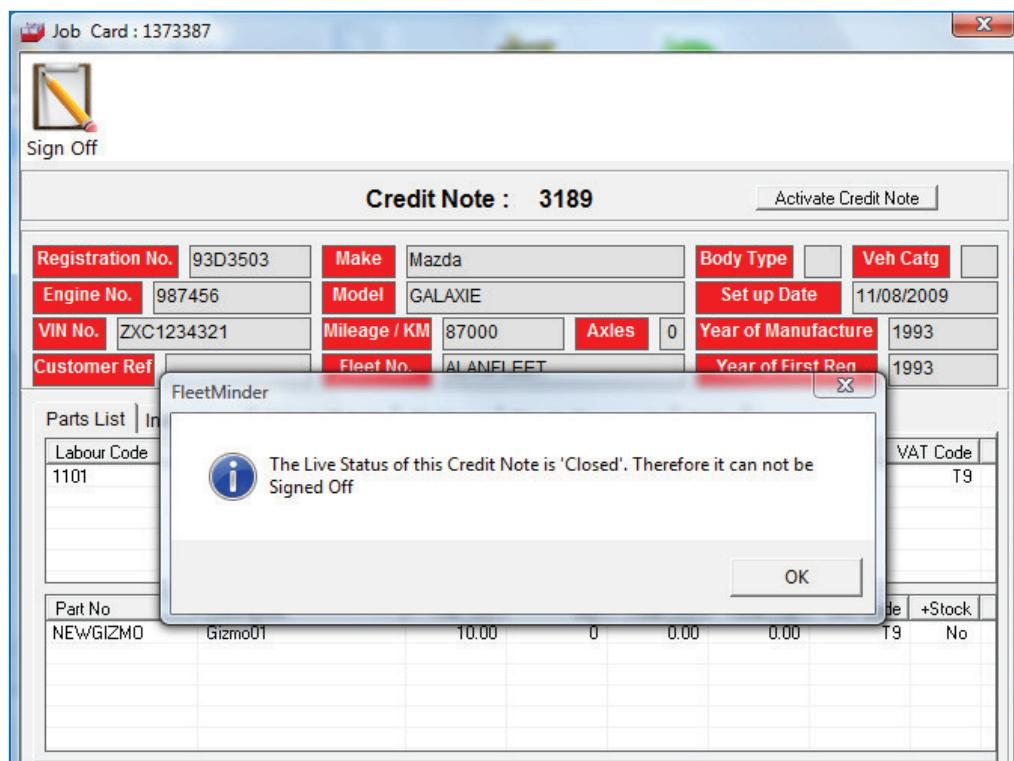
Click **Job Cards**.

Click **Credit Notes**.

Find the credit note, either by *Status – All Open / All Closed* and then scrolling through the list for the note, or by using the search criteria and then click on it to highlight it and then click **View**.

If the Credit Note is Closed

Click **Sign off Credit Note**.



Sign Off a Second Time

A message will appear, notifying you that this credit note has already been signed off and cannot be signed off again.

Click **OK** to this message.



Administrative Address:
ASC Software Limited
Unit 58, Le Broquay Avenue
Parkwest Ind Park, Dublin 12.

ASC Software -- AHS Installations
11/12 Westlink Ind. Est.,
Kylemore Road,
Dublin 10

Customer No : ALA08035
Account No :
Job No : 1373387
Job Setup Date : 11/08/2009
Customer Order No :

Credit Note 3189
Invoice Date 11/08/2009
Invoice No. 0

Workshop Credit Note

Reg. Number :	93D3503	Chassis No :	ZXC1234321
Make :	Mazda	Engine No :	987456
Model :	GALAXIE	Mileage :	87000

Labour Details

Labour Code	Description	VAT	Qty	% Disc	Price	Total
1101	Std Labour	T9	1.00	0.00	45.00	45.00
Total Labour Value						45.00

Parts List

Part No	Description	VAT	Qty	Price	% Disc	Price	Total
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Workshop Credit

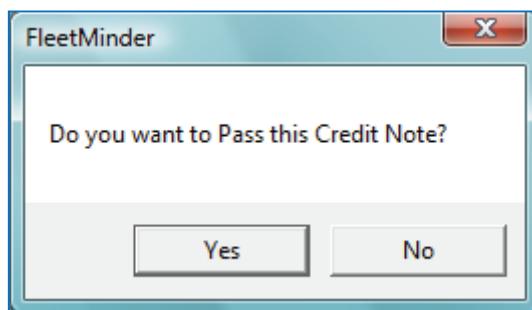
A *Workshop Credit Note* will appear and can be viewed or printed.

When you have finished, click the  in the top right corner.
Then click **Close** on the credit note.

If the Credit Note is Open

Click **Sign off Credit Note**.

First the Pro Forma Credit Note will then be displayed. If you are satisfied with the details then click the  in the top right corner.



Click **Yes** to complete and display the credit note or click **No** to go back without completing the credit note.